The Business Solution for Fashion & Lifestyle

Home Shopping

Order Management

CIMS V8.1

Document Control

Version	1.1
Release Date	23-FEB-12

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Change Control

Date	Version	Details of Change
30-JAN-12	1.0	Summary of changes from V7.10 to V8.1: All sections in the document have been reviewed and updated and all screenshots changed to reflect the new CIMS look and feel introduced in V8.1. HS0A – Home Shopping Order Entry • Status area – a new status of Query Card has been added and a change has been made to the status that appears for dead orders that contain sundry costs but where there are no despatches (see section 2.4) • Delivery Address – when a delivery address is changed, the list of addresses will also include stores flagged as Buy & Collect (see section 2.3) HS0D – Returns • If the original delivery went to a store as part of the Buy & Collect process, the delivery address will be defaulted to the customer's invoice address as the store address is not relevant at this stage (see section 8.1) • The price will come directly from the order rather than from the price list attached to the country and the customer resides in (see section 8.1) HS0G – Complete Despatches • Zero payment lines are now considered (see section 4.2) HS0H – History of Catalogue Requests • Further information added on how to search for a specific date in the Date Requested field (see section 4.3) HS7B – Home Shopping Order Amendment • Delivery Address – when a delivery address is changed, the list of addresses will also include stores flagged as Buy & Collect (see section 6.2.4) HS0P – Customer Collection in Store • This screen has been added as part of the Buy & Collect process (see section 7.4) HS0Q – Batch Buy and Collect Store Alerts • This screen has been added as part of the Buy & Collect process (see section 7.5)
23-FEB-12	1.1	Accessing HS0A Home Shopping Order Entry using HS0I Home Shopping Defaults • The default warehouse comes from the Home Shopping Head Office store in NA0G Own Retail Stores (see section 2.1)

Date	Version	Details of Change
		HS0D – Returns • To find a sales order ID, HS0E Order History Query must be accessed separately rather than pressing the Order History button as this only works if a valid sales order ID has been entered (see section 8.1)

Contents

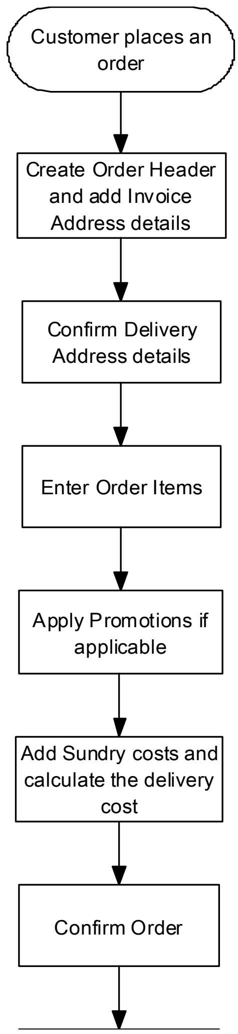
1 INTRODUCTION

Home Shopping orders includes Mail Order orders and eCommerce orders. This document covers the functionality relating to order management including information on customer maintenance, order entry, applying promotions/promotional vouchers to orders, calculating delivery costs on orders, creating despatch notes, order amendments, refunds, re-despatches, exchanges, managing held orders and order history screens. Gift cards are mentioned throughout this document, however a separate document is available that covers the gift card process in detail. Other Home Shopping documents are:

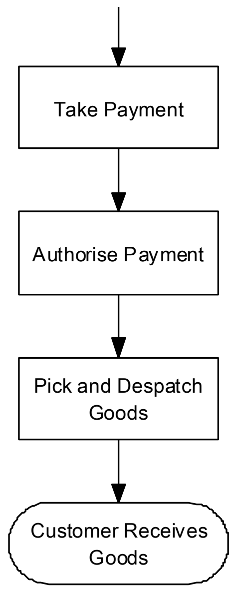
- Home Shopping Data Set Up V8.1 – includes information on all of the control and validation data set up that is required prior to raising Home Shopping orders, including payment codes, promotions/promotional vouchers, gift cards and the automatic calculation of delivery costs
- Home Shopping Gift Cards V8.1 – includes information relating to the complete gift card process
- Home Shopping Alerts V7.10/V8.1
- Home Shopping Buy & Collect V8.1

1.1. Standard order process

As a guide, the general Home Shopping Order process is as follows:



Process continues overleaf

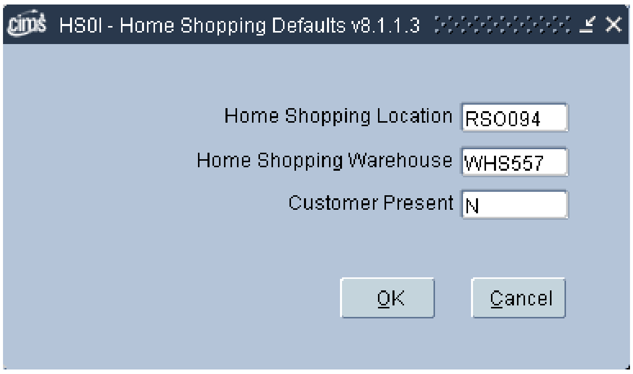


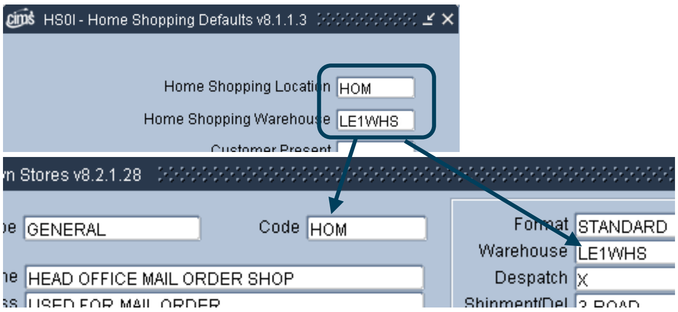
NOTE: all steps, up until when the goods are picked and despatched to the customer, are carried out in HS0A Home Shopping Order Entry and HS0N Customer Address Maintenance.

2 HS0A – HOME SHOPPING ORDER ENTRY

2.1. Accessing the Screen

When you first enter HS0A, a pop up window will appear asking you to confirm the Home Shopping Location, the Home Shopping Warehouse (despatching) and if the Customer is present or not. This window is actually HS0I Home Shopping Defaults.



<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Home Shopping Location</td><td>The default comes from the Default Home Shopping Head Office Location field in HS9A Master Control Table. F9 List Values is available if the information needs to be changed.</td></tr>
<tr><td>Home Shopping Warehouse</td><td>The default comes from the Warehouse field attached to the default Home Shopping Head Office location in NA0G Own Retail Shops:


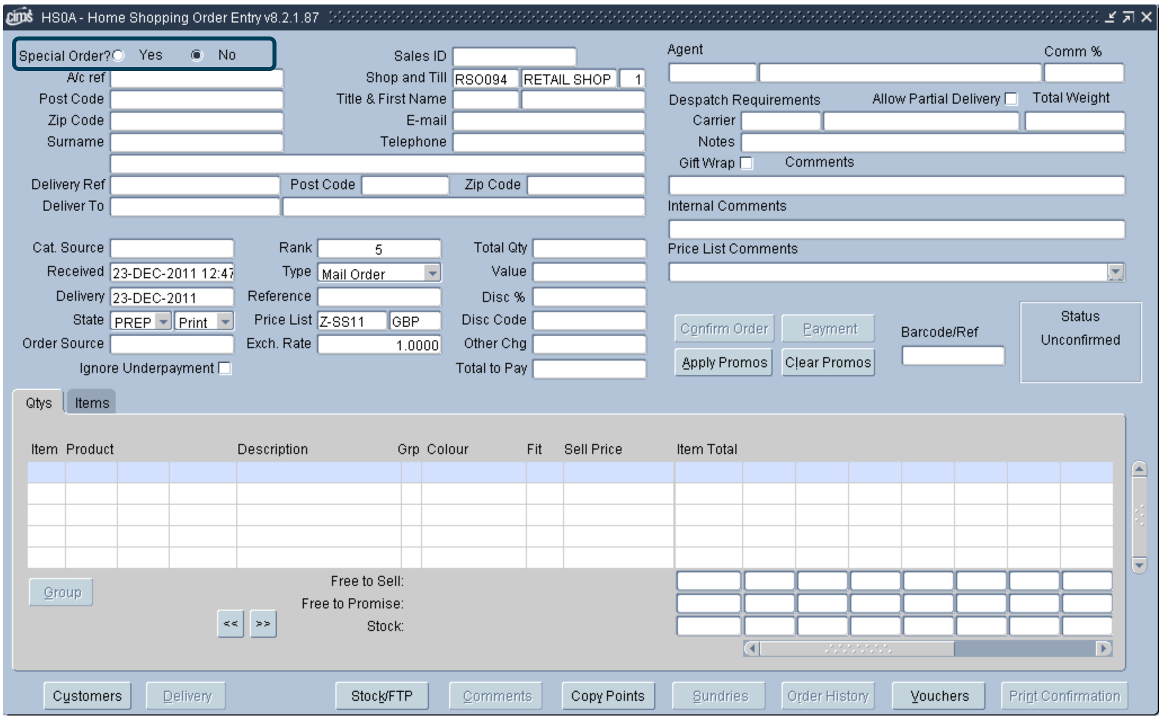
F9 List Values is available if the information needs to be changed.</td></tr>
<tr><td>Customer Present</td><td>Typically, the customer won't be present when an order is being taken so this field should be set to N.</td></tr>
</table>

- Press **Enter** or use the **Tab** key to move to the Customer Present field
- Enter N, then press **OK**

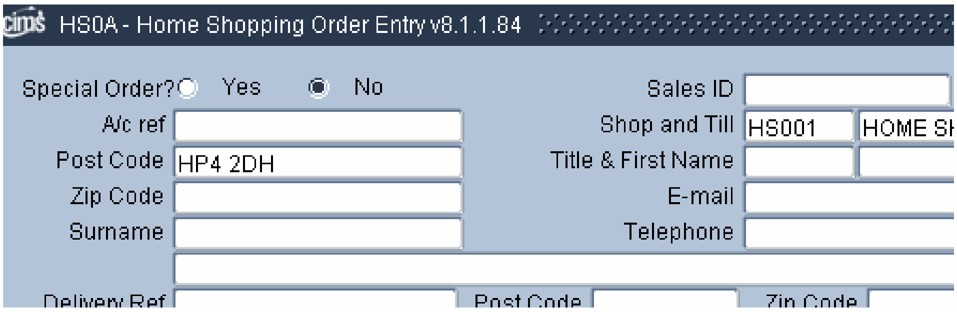
NOTE: you will not be required to enter this information again during the login session.

2.2. Adding Customer Address details

The main screen will appear. The 2 radio buttons circled on the following screenshot relate to whether the order is a home shopping order or special order and is defaulted from the previous screen. For the majority of businesses, this will be set to N (i.e. the customer is not present):



- Press Enter or use the Tab key to move to the **Postcode** field
- Type the postcode and press Enter

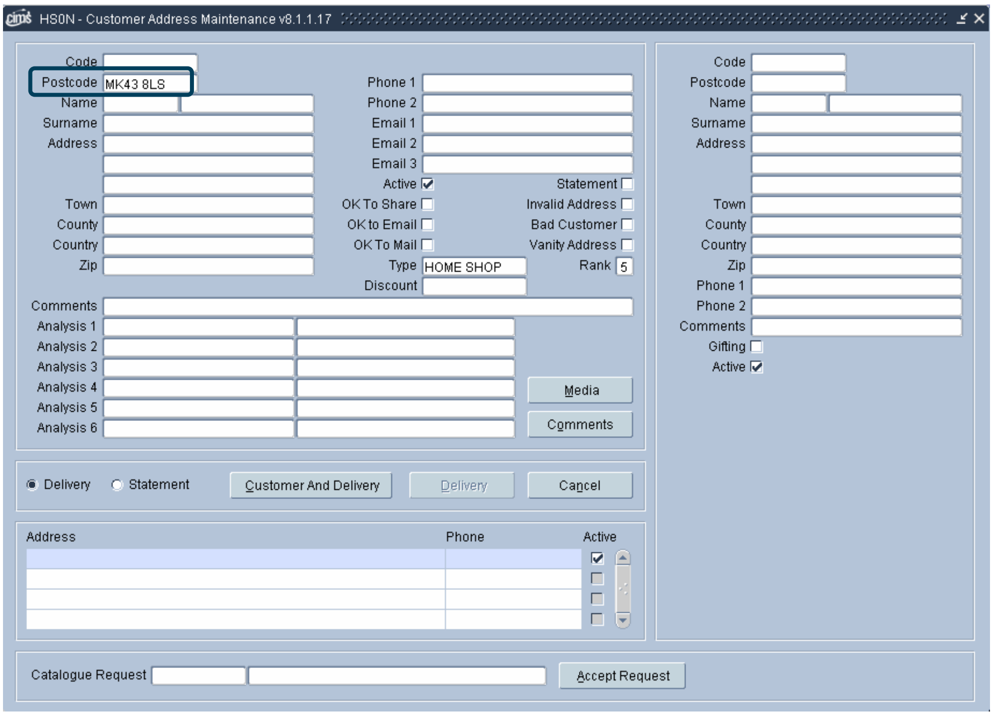


There are 3 scenarios:

1. Customer does not exist and needs to be created (see section 2.2.1)
2. Postcode is attached to one customer only (see section 2.2.2)
3. Postcode is attached to multiple customers (see section 2.2.3)

2.2.1. Postcode not attached to any customer

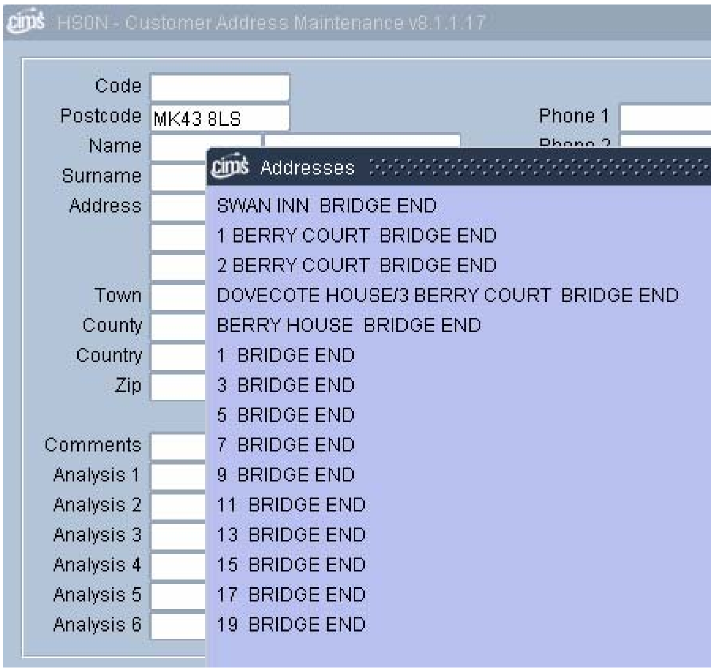
HS0N Customer Address Maintenance will automatically open with the Postcode field completed:



- Complete the following key fields; fields not mentioned are not applicable, are optional or are already completed with default settings. Press Enter or use the Tab key to move between the fields and ↑ and ↓ arrows in a list of values

  NOTE: your business may require more fields to be completed than are described e.g. a business may also require an alternative contact number (e.g. a mobile) and email address. See section 3 for information on all of the fields on this screen.

  Postcode – F9 List Values and select; the list of valid addresses is taken from the Post Office Address File (PAF):



  The appropriate address fields will be completed on the main screen

Name (first field) – enter the customer's title

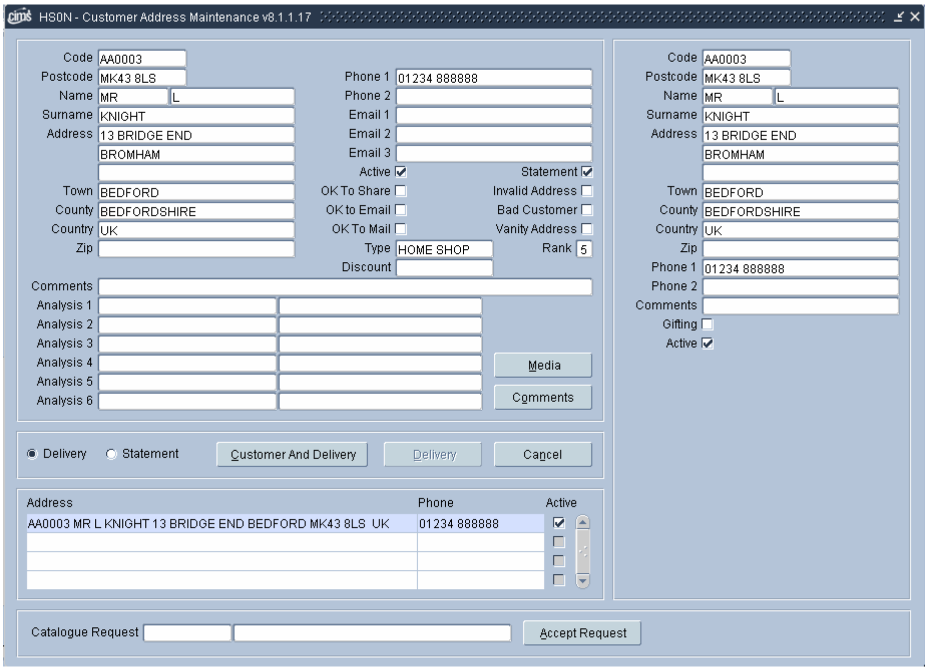
Name (second field) – enter the customer's first name

Surname – enter the customer's surname

Address, **Town**, **County** and **Country** – these will have been automatically completed

Phone 1 – enter the customer's primary contact number

All mandatory fields are now complete; the customer is active by default and therefore an order can placed immediately.



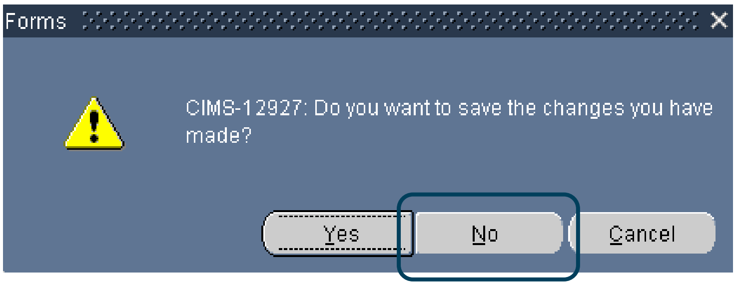
NOTE: the address in the main block is the statement address. If the delivery address is the same as the statement address, nothing more needs to be done as this will be copied to the delivery address block. However if the delivery address is different, this also needs to be entered (see section 2.3).

- Click on the Customer And Delivery button to continue entering the order in HS0A Home Shopping Order Entry.

2.2.2. Postcode is attached to a single customer

The customer's details will be automatically populated into HS0A Home Shopping Order Entry. If this is the correct customer, continue completing the order (see section 2.4 onwards). However, if the customer is not correct, take the following steps:

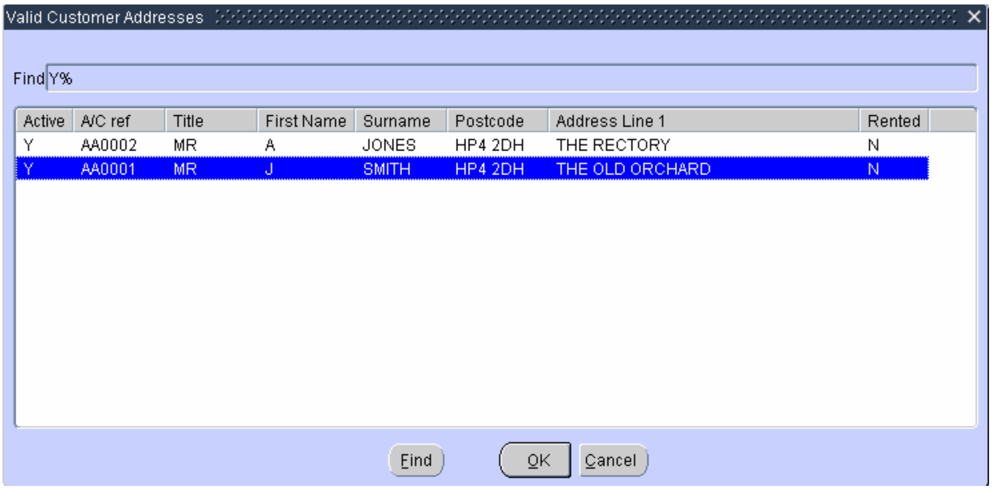
- Clear the details by clicking on the Clear Form icon in the toolbar or clicking on Shift+F3
- The following message will then appear to which you <u>must</u> click on NO:



- Click on the Customers button at the bottom of the screen
- HS0N will automatically open; enter the postcode in the **Postcode** field and repeat the steps shown in section 2.2.1

2.2.3. Postcode is attached to more than one customer

The choice of customers will be displayed in a pop up window:



- If the customer can be found in the list, select the customer and click on OK.
- Another pop up window will appear showing the most recent delivery address that was used, which may or may not be the same as the invoice address. Click on OK to choose it or press Cancel where the invoice address will be populated as the default.

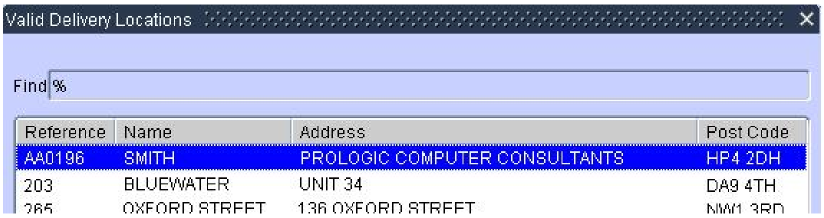
  If you want to change the delivery address, follow the steps in section 2.3
- If the customer cannot be found in the list, click on Cancel; HS0N Customer Address Maintenance will automatically open with the **Postcode** field completed. Continue with the steps shown in section 2.2.1

2.3. Check the Delivery Address

The default setting is that the delivery address is the same as the statement address, but this can be changed if required.

If the header block details have not been committed to the database:

- Click on the **Delivery Ref** field
- F9 List Values to view the list of delivery addresses available; in V8.1, this list will include stores flagged as Buy & Collect in addition to the customer's delivery addresses

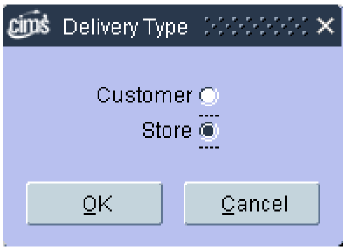


The customer delivery addresses are shown first, followed by the store collection addresses. The stores are ordered by the store short code.

- Use the 🡩 and 🡫 arrows to find the correct address and click OK; the delivery address in the header will be updated and the remaining header fields can be completed

Alternatively:

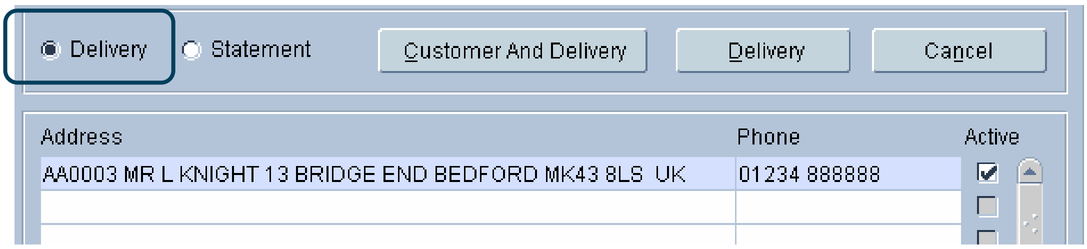
- Click on the **Delivery** button at the bottom of the screen
- The following pop up window will appear; this has been added in V8.1 as part of the Buy & Collect process:



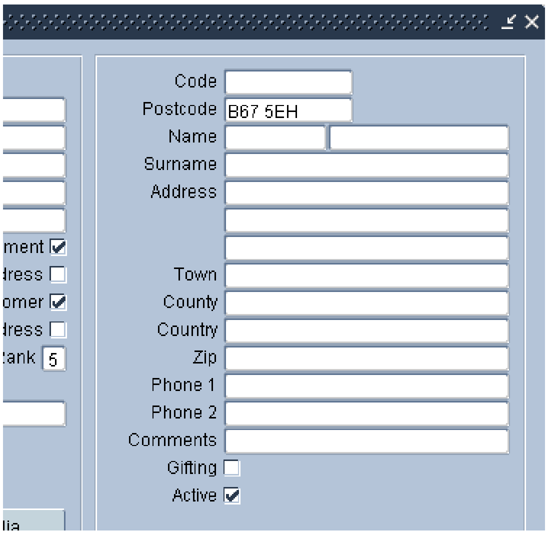
Store – if this button is selected, a pop up window will appear showing the list of valid store collection addresses. Use the 🡩 and 🡫 arrows to find the correct address and click OK; the delivery address in the header will be updated

Customer – if this button is selected, you will be shown a list of customer addresses or will be taken to HS0N Customer Address Maintenance where a new customer delivery address can be created

- If HS0N Customer Address Maintenance has opened, click on the **Delivery** radio button:



- Click on the Alternative Address block, press the 🡫 arrow to see a blank screen

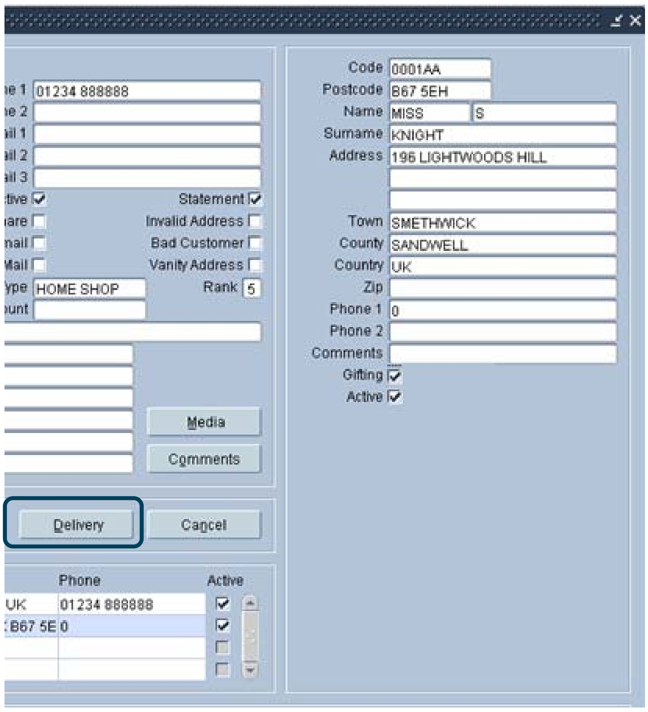


Postcode – enter the postcode of the delivery address; F9 List Values and select the relevant address. Complete other details as required e.g. **Phone 1**

Gifting – as the name and address are different, this tickbox will be automatically ticked. This means that certain information will be omitted from the delivery documentation enclosed with the goods. However the tickbox can be un-ticked if required

Active – leave the tickbox ticked

- F10 Commit
- Press the **Delivery** button



- You will be taken back to HS0A Home Shopping Order Entry where the delivery address details will have changed:

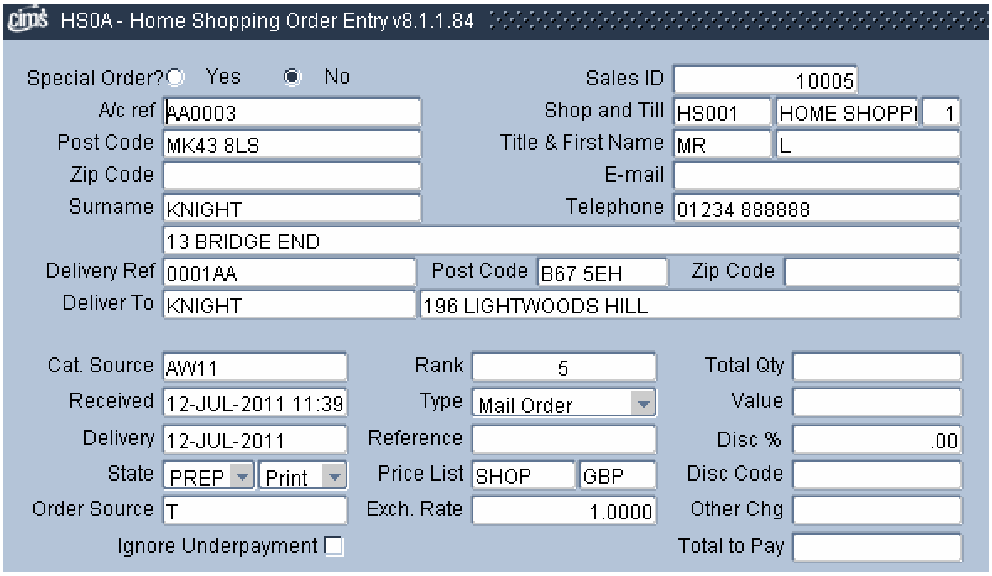
2.4. Completing the Header Block fields

- Complete the following key fields; fields not mentioned are not applicable, are optional or are already completed with default settings. Press Enter or use the Tab key to move between the fields and ↑ and ↓ arrows in a list of values

  Cat Source – F9 List Values and select; once the order has been set to LIVE, it will no longer be possible to alter the catalogue code

  Order Source – F9 List Values and select e.g. T for Telephone

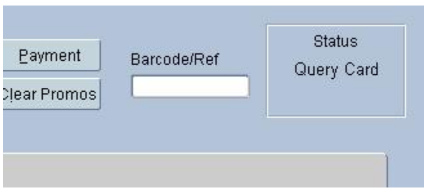
- F10 Commit; the Sales ID will be populated at this stage



The following table describes the remaining header block fields in detail:

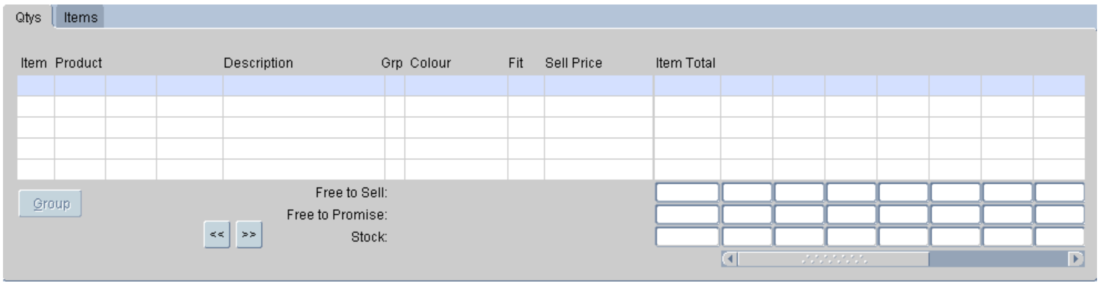
Field	Description
Received	This is the date and time that the order was put onto the system – it will default to today's date and cannot be changed.
Delivery	This is the required delivery date and will initially default to today's date. When products are added to the order, they will each have a lead-time associated with them, which will calculate an expected delivery date for the customer. The system will then overwrite the default delivery date with the latest delivery dates for all products attached to the order.

Field	Description
State	The initial state of the order will be PREP. This should be left as it is. The other states of LIVE, DONE and DEAD will be used at different stages further on in the process.
Ignore Underpayment tickbox	This is a display field only. A separate screen exists for underpayment maintenance (see section 4.4).
Rank	Valid entries are 1 through to 9. This field is used to prioritise sundry cost codes e.g. next delivery could be a rank 1.
Type	There are two valid choices: • Mail Order • E-commerce Mail Order is shown first because this is the most commonly used, but this can be changed to E-commerce if required. For example, it may be that the customer has used the website to find the product they wish to order but has rung the telephone line to actually place the order.
Reference	30 character free text field. Typically, this is used for web order reference codes.
Price List <2 fields>	Price lists are defined against countries, therefore the Price List field will automatically populate with the price list defined for the country associated with the customer in HS0N Customer Address Maintenance. NOTE: the destination delivery address has no bearing on the price list, as it is the customer placing the order rather than the customer that the order is being delivered to that is important. The Amend Price List tickbox in HS9A Master Control Table determines whether or not you are able to change this field. If promotions are applicable to the order (see section 2.6), but a change to the price list results in a change to the promotions that are applied, the user will be warned that this has happened.
Exch. Rate	This is the current exchange rate. If the currency is the base currency being used (e.g. GBP), this will be set to 1.000, but will show different values if the price list is in a currency other than the base currency.
Total Qty	These fields are updated by the system at the appropriate time.
Value	
Disc %	If a discount percentage has been attached previously to the customer's record, it will be shown in this field and will be applied to the complete order. A discount percentage can be added at this stage if required. NOTE: discounts cannot be applied to a gift card purchase.
Disc Code	This field is only relevant if the Disc % has been entered and will be mandatory in this case. F9 List Values is available and will show a list of valid discount codes to

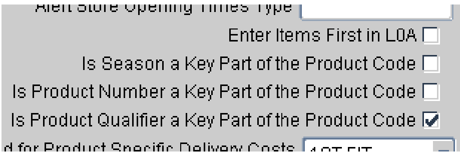
Field	Description
	choose from.
Other Chg	These fields are updated by the system at the appropriate time.
Total to Pay	
Agent	These are populated from your own logon ID if the Use Staff Member as Agent field is ticked in HS9A Master Control Table. If commission is calculated, this will be done using this field and therefore changing this field or leaving it blank will lead to commission errors.
Comm %	This relates to the Agent field and is the commission that will be applied to the order. It cannot be updated.
Allow Partial Delivery tickbox	If the products on the order are not all available at once, this tickbox denotes whether or not the delivery can be split. If the number of deliveries per order is greater than one, by default this is seen as a part delivery.
Despatch Requirements (Carrier and Notes fields)	If the business is interfacing to a carrier despatch management system, the carrier information will be shown here.
Total Weight	If weight is defined against a product, the cumulative weight of the delivery will be shown here as each product is added to the order.
Gift Wrap tickbox	This will be populated according to the customer account details. However, it can be overwritten at this stage if required. If the Gift Box is ticked by default but is then un-ticked, a warning message will appear saying that Gift Charges may need to be removed.
Comments	These boxes have no specific purpose, but can be used to add comments against this order. Each box can contain up to 200 characters.
Internal Comments	
Price List Comments	This field is populated from comments entered against the price list and are for information for the user only. The comments will only appear if the Show Price List Comments tickbox in HS9A Master Control Table has been ticked.
Status	This area shows the status of the order e.g. Unconfirmed, Cancelled, Overpaid etc. In V8.1, a new order status called Query Card has been added:  Prior to V8.1, if the state of the order was DEAD and there were no despatches but sundries existed on the order, the order status was set to Confirmed. From V8.1, irrespective of whether or not sundries exist on this type of order, the order status is now set to Cancelled.

2.5. Items block

- Move to the Items block



You will be taken directly to the key part of the product code as identified by the tickbox that has been ticked in HS9A Master Control Table:



Field	Description
Is Season a Key Part of the Product Code?	This will display the season, product number and product qualifier
Is Product Number a Key Part of the Product Code?	This will display the product number and product qualifier
Is Product Qualifier a Key Part of the Product Code?	This will display the product qualifier only; this is used in the following example

Complete the following key fields; fields not mentioned are not applicable, are optional or are already completed with default settings. Press Enter or use the Tab key to move between the fields and 🡅 and 🡇 arrows in a list of value

Product (3rd field – Product Qualifier) – enter the product qualifier; all other product details will be populated automatically

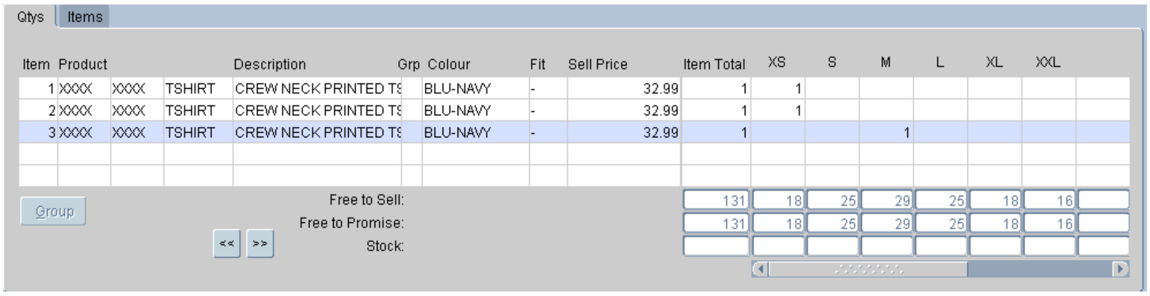
Colour – if there is only one colour it will be populated automatically; F9 List Values and select if there is more than one colour

Fit – if there is only one fit it will be populated automatically; F9 List Values and select if there is more than one fit

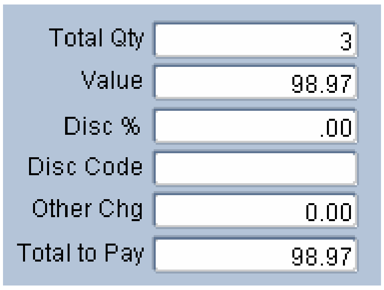
Size Quantities – enter size quantity

NOTE: if ordering multiple quantities of the same size or multiple sizes, create a separate order line for each item; this will simplify the amending, cancelling and returning process.

Free to Sell – this shows the quantities that are available:



- F10 Commit
- The header will be updated with the total order quantity, total order value and total to pay



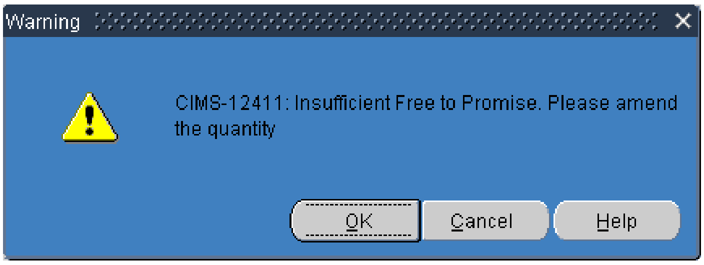
See section 2.6 on how promotions are applied.

The following table describes the remaining item block fields in detail:

Field	Description
Item	This is a sequential number that will be populated automatically by the system at the appropriate time.
Description	This will be automatically completed.
Grp	This field will either be blank or display a * if the product is grouped with other products for cross selling purposes e.g. matching items are available. If a * is shown, the Group button will be enabled – see information on this button at the end of this table.
Sell Price	This will be populated automatically. This shows the actual price that the customer will be paying for the item. The Items tab has a field called Ticket Price, which shows the full price for the item. These prices may be different depending on whether any discounts have been applied or the product ordered is a gift card. If the product ordered is not a gift card, changing the selling price will force you to put in a price change (likely to be a discount) reason code. If the product ordered is a gift card, the selling price will initially show the minimum initial load value for the card. This can then be increased to show the amount that the customer wishes to purchase on the gift card (up to the defined maximum). No price change code will need to be entered for a gift card product. Separate documentation is available on the Home Shopping Gift Card process.
Item Total	This total is calculated by the system, once quantities have been entered in the quantity fields.

Field	Description
Group button	This button is only accessible against products that have a * against the Grp field in the Items block. A pop up window will appear, showing all products that are considered relevant for cross selling e.g. matching bra to brief set:

At the bottom of the screen, you may be shown the Free to Sell, Free to Promise and Stock quantities, depending on whether the appropriate radio buttons are selected in HS9A Master Control Table. If you try and order something that is not in stock or there is not enough free to sell, you will be given the appropriate warning message e.g.:



2.6. Applying Promotions to an order

Promotions will be activated for an order based on the factors like Shop, Order Catalogue Source, Price List, Promotional Vouchers and the Date when the order was raised. The date/time stamp of an order determines the promotions and not the current system date/time.

Products marked down in price can be included in promotions if required and can even be specifically targeted e.g. Give 20% off all products against a markdown code of 10OFF. However, if the price on a product is manually adjusted, this will be excluded from promotions.

If the Apply Promotions on Order Completion tickbox in HS9A Master Control Table is ticked, the promotions will be automatically recalculated at the point the order is set to LIVE.

When promotions are created for use in Home Shopping, they can be flagged as Auto Entry. These promotions will be prompted to the user as the order is being compiled. Those promotions not flagged as auto entry will not be prompted; it is up to the user to apply the promotions after all the products have been added to the order.

The method chosen depends on the business process e.g. how much emphasis is placed on giving customers the 'best' deal, is the use of promotions widespread across the business, are promotions applied infrequently etc. There are pros and cons to each method and these should be understood before deciding which to use. It may be that a mixture of Auto Entry and non Auto Entry promotions is required and the Auto Entry promotions are just used for key promotions in place for a limited amount of time.

Promotions can also be flagged as exclusive; if a promotion flagged in this way is also considered to be the highest priority, the exclusivity will be applied meaning that no other promotions will be applied to the order.

For both options, if users are aware of the promotions that are active at any one time, they can help the customers get the best deal. See sections 2.6.1 to 2.6.8 for more information on how the different methods are applied during order entry.

2.6.1. Applying one non Auto Entry promotion to an order

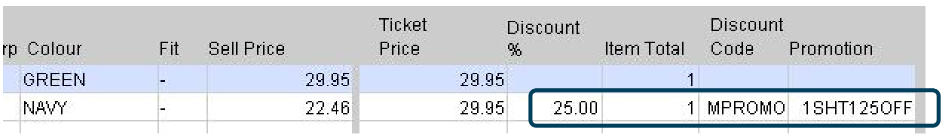
In this example, a promotion has been created against promotion type A in PM9B Valid Promotions and PM0A Promotion Definition where a customer buys 1 shirt and gets another shirt for 25% off (including t-shirts). The Auto Entry tickbox is left un-ticked in PM0A Promotion Definition.

- Enter the products that the customer wants to order e.g. SU03 SSCK 001 in Green x1 size S and Navy x1 size S
- F10 Commit

You should be aware that the customer qualifies for the Buy 1 Shirt, Get Another for 25% off and therefore will tell the customer.

- Click on the **Apply Promos** button; this will identify the promotion and reduce the ticket price accordingly on the product that qualifies; the Total to Pay will also be changed:

- Click on the **Items** tab to view more information on the promotion that has been applied i.e. the discount, the discount code, the promotion code and the promotion description with other fields seen by using the scrollbar



2.6.2. Applying multiple non Auto Entry promotions to an order

If more than one promotion applies to the products that are entered, these will be applied automatically according to the priorities that are set against the promotions in PM0A Promotions Definition.

In this example, two promotions have been created. The first is if the customer buys one shirt, they get another for 25% off (priority 1) and the second is if a customer buys one shirt, they get a free gift from a selection of different products (priority 2). The Auto Entry tickbox is left un-ticked in PM0A Promotion Definition against both of these promotions.

- Enter the products that the customer wants to order e.g. SU03 SSCK 001 in Green x2 size S and Navy x1 size XS and SU03 SSCX 006 Green x1 size XS
- F10 Commit

- Click on the **Apply Promos** button; as each of the green shirts on the first line triggers a promotion against the navy shirt and green belt, the original row showing the 2 green shirts will now be split into two and the ticket prices on the products that qualify for the promotions will be amended:

- Click on the **Items** tab to view more information on the promotion that has been applied i.e. the discount, the discount code, the promotion code and the promotion description with other fields seen by using the scrollbar

2.6.3. Applying one Auto Entry promotion to an order

In this example, a promotion has been created against promotion type A in PM9B Valid Promotions and PM0A Promotion Definition where a customer buys 1 shirt and then gets a free gift from a selection of different items (the products being given as gifts, are set up with a 100% discount so that the result is that they are free). The Auto Entry tickbox has been ticked in PM0AJ Promotion Definition and one of the gifts has been set as the default.

- Enter the products that the customer wants to order e.g. SU03 SSCX 001 in Green x1 size M

- Move to the next row; as an auto entry promotion applies, a window will open showing the gift items that are available. The first one in the list will have been highlighted as the default in PM0A Promotion Definition
- Ask the customer which product they would like as the free gift. The Promotion Allows Quantity Of field shows how many products the customer is entitled to e.g. 1. If you try and enter more than the entitlement, you will get the following message

  Too many products selected

  If you enter less than the entitlement, you will get the following message:

  You have selected fewer than the available number of items – OK to continue?
- Highlight the product and click on **Add**

  You will be taken back to the main HS0A Home Shopping Order Entry screen where the promotional item will have been added and is highlighted in green

- Continue to process the order as normal.

If the customer doesn't want a free gift, click on **Decline** when the window showing the free gifts appears. You will get the following warning message:

OK to Decline this Offer?

Click on OK and you will be taken back to the main HS0A Home Shopping Order Entry screen where the item will not have been added.

NOTE: declining the offer, removes it completely from this order meaning that is can no longer be applied. If this was a mistake, the Clear Promo button should be pressed as this clears away all memory that the promotion was declined and it can then be re-applied by clicking on Apply Promos.

2.6.4. Changing a promotional item

It may be that the customer has selected a promotional item but wants to change it e.g. they want to choose a different free gift or want to change the size or colour of the product (whatever is applicable to the order).

In this example, the customer received the Buy 2 Shirts, Get Another for 50% Off promotion and chose a Navy shirt in size XS.

- Move to the promotional item, which is highlighted in bright green.
- Click on the Delete button to delete it. The following message will appear:

  Decline this offer, or choose another item?
- Click on **Choose Another**; the promotional item will be removed at this stage
- F10 Commit; the same promotion will be re-launched and will show the options again
- Select the different size
- Click on **Add** and continue as before

2.6.5. Applying multiple Auto Entry promotions to an order

In the following examples, two Auto Entry promotions will be used. The first is where if the customer buys two shirts, they get a third for 50% (priority 1) and the second is where if a customer buys 1 shirt, they get a free gift from a selection of different items (priority 2). The Auto Entry tickbox has been ticked in PM0A Promotion Definition against both of these promotions.

As these promotions are both Auto Entry, they will be prompted to the users at different times depending on the order in which the products are entered, how many of the products are entered and what priority these promotions have been given.

NOTE: if a product triggers a promotion, it will not be used as a trigger for other promotions. Using the example promotions above, if the customer buys one shirt, which triggers the Buy 1 Shirt, Get a Free Gift promotion and then buys a second shirt, the system will not see that two shirts have been bought and then trigger the Buy 2 Shirts, Get Another for 50% Off promotion. The Buy 1 Shirt, Get a Free Gift promotion will be triggered again. The exception to this is a basket promotion, which will be applied regardless of what other promotions have been applied.

The following examples show the different effects that multiple auto entry promotions can have on an order, depending how they are applied.

Example 1 – declining one promotion in favour of another promotion

- 1 shirt is entered
- The Buy 1 Shirt, Get a Free Gift promotion is triggered and is automatically displayed
- The gift is selected and added to the order
- Another shirt is entered
- The Buy 1 Shirt, Get a Free Gift promotion is triggered again and is automatically displayed

You could at this stage say to the customer that they actually qualify for a different promotion and that instead of getting 2 free gifts, they could actually get a third shirt for 50% off because they have bought 2 shirts. The reason that the promotion is not triggered automatically is that the 2 shirts have both already contributed towards promotions.

If the customer doesn't want another shirt and therefore still wants the two free gifts, you can add the second gift and then complete the transaction as normal.

However, if the customer wants to take advantage of the Buy 2 Shirts, Get Another for 50% Off, the gifts need to be removed and the promotions re-applied – the system will know that 2 shirts have been bought and apply the Buy 2 Shirts, Get Another for 50% Off promotion because it is a higher priority.

- Click on Decline to remove the promotion

  The following message will appear:

  OK to Decline this Offer?

- Click on OK; you will be taken back to the main HS0A Home Shopping Order Entry screen where the item will not have been added.

  As declining the promotion has removed the promotion from the order completely, the previously selected gift item is still showing on the order, but is no longer showing as free:

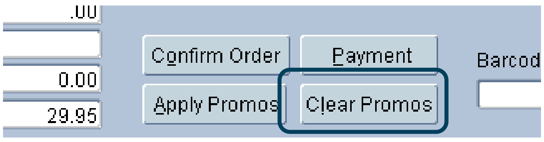
- This product also needs to be deleted. Highlight the product and click on the  button to delete it. The two shirts will be left on screen.

- F10 Commit; at this stage, the new Buy 2 Shirts Get Another for 50% Off promotion will be triggered instead

- Enter the quantity and click on **Add**; you will be taken back to the main HS0A Home Shopping Order Entry screen where the promotional item will have been added and will be highlighted in green.

- Continue to process the order as normal

2.6.6. Clear Promos button



This button has been referred to previously as it is needed in certain scenarios to clear promotions from an order so that different ones may be applied. However it is also useful if you have made a mistake during order entry and accepted or declined promotions when you didn't mean to. If you have made an error in accepting or declining promotions on an order, the Clear Promos button removes all references to all promotions so that you can start again.

For example a gift has been added as part of a promotion, but the customer changes their mind and therefore the promotion is declined meaning that it is no longer applicable. The customer then changes their mind again but as the system knows that the promotion has already been declined, it cannot be re-applied.

Clicking on the Clear Promos button removes all trace that this promotion existed against this order so that it can be re-applied.

NOTE: this button is only available on PREP orders.

2.6.7. Apply Promos button

This button has been referred to previously as it is used to apply promotions that are not flagged as Auto Entry or re-generate promotions on an order if a mistake has been made.

NOTE: this button is only available on PREP orders.

2.6.8. Promotions automatically applied at the point of order confirmation

If the Apply Promotions on Order Completion tickbox in HS9A is ticked, the promotions will be re-calculated at the point of order confirmation. A business decision will need to be made on whether the setting of this tickbox is appropriate for the business processes.

2.6.9. Promotions applied in eCommerce

When the customer finishes adding products to the basket and starts the checkout process, any valid promotions will be shown to the customer so that they can see how much they need to pay. At this stage in the process, the promotions are for display purposes only. Once the payment process starts, the basket contents are converted to a sales order and at the point, the promotions are actually applied to the order. At the end of the payment process, a final check is made to ensure that the total price being paid matches the new total that has been calculated.

There will be a very small gap in time between when the customer sees the promotions that are going to be applied and when they are actually applied.

It is extremely unlikely that the promotions will change during this time window (i.e. an existing promotion goes offline or a new promotion comes online) however if this happens and a mismatch is generated when the final check is done, an error will be sent back to the website; the basket content can then be re-calculated and will show the revised totals.

2.7. Applying Promotional Vouchers to an order

Promotional Vouchers can be sent to named individuals or specific companies, downloaded from the Internet or even cut out from a press advertisement; they will trigger promotions when Home Shopping orders are placed. For example, the promotional vouchers could be used to promote the launch of a new season’s range online.

For promotions that are valid for Home Shopping, customers are unlikely to be present when placing an order and so will be unable to produce the original voucher. In order to reduce fraudulent use of the voucher codes, the codes will be ‘scrambled’ when generated. The Home Shopping Data Set Up document shows information on the voucher code format being used in Home Shopping.

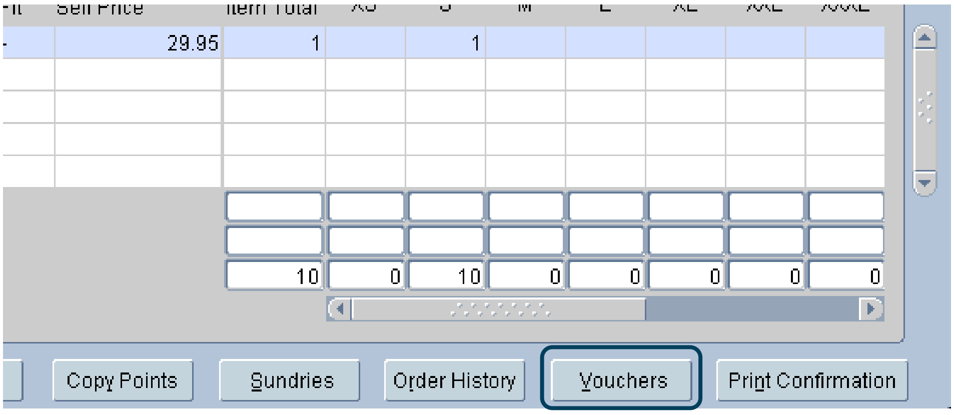
A voucher can either be used once, or can be used multiple times. If it is for one use, it will have a unique barcode. If it is being used multiple times, all vouchers will have the same barcode. These barcodes are linked with the promotions themselves and controls are in place to ensure that a single use voucher cannot be re-used.

Promotional vouchers can be added or removed as long as the state of the order is PREP.

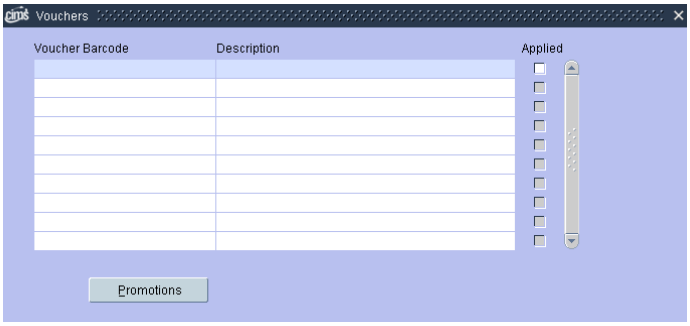
2.7.1. Vouchers button

In this example, a promotion has been created against promotion type D in PM9B Valid Promotions and PM0A Promotion Definition where a customer buys at least one product from a specific company division and gets 50% off. The Vouchers tickbox is ticked in PM0A Promotions Definition, meaning that the promotion can only be triggered by a voucher.

- In HS0A Home Shopping Order Entry, complete the header blocks as normal and then move to the items block.
- Enter the products that the customer wants to order; e.g. SU03 SSCX 001 in Green x1 size S
- F10 Commit
- Click on the **Vouchers** button:



The following pop up window will appear:



Voucher Barcode – enter the prefix for the voucher type followed by the barcode of the voucher. There should be no spaces. The prefix is predetermined in PM9C Voucher Barcode Control. If the voucher isn't valid, the following message will appear: *Invalid Voucher Barcode*

The remaining fields can be ignored as the Description will be populated automatically and the Applied tickbox will be set as soon as the voucher promotion has been triggered

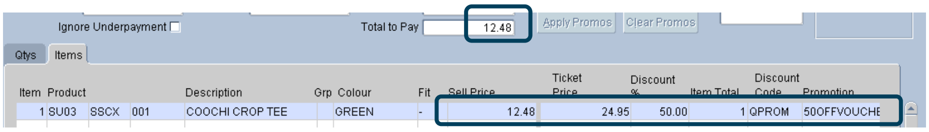
- Click on the **Promotions** button to see the potential promotions that are applicable to this voucher; more than one can be shown

  In this example, only one promotion exists (50% off)

- F10 Commit

- Exit the screen by clicking on the X at the top right hand corner; you will be returned to the main screen

- Click on the **Apply Promos** button; the ticket prices will be adjusted accordingly. In this example, the Sell Price was £24.95 and this has been adjusted to £12.48 (the screenshot shows the promotion details on the Items tab):



2.7.2. Cancelling an order that has a single use promotional voucher applied

If an order is cancelled that has a single use promotional voucher attached to it, the promotional voucher cannot be un-redeemed and then re-used on another order.

If the business decides that in certain circumstances, the customer should receive the promotion on another order, one of the following options should be used:

- Issue a replacement voucher to the customer, which can then be redeemed against a new order

OR

- Manually discount the order so that it mirrors the voucher promotion

2.8. Applying both Promotions and Promotional Vouchers to orders

It may be that Auto Entry promotions, “normal” promotions and those triggered by Promotional Vouchers are all applicable to a customer’s basket. It is possible to attach promotions of all these types to a single order.

NOTE: the promotion calculation will only take a promotion using a promotional voucher into account, if the promotional voucher has been attached to the order.

For example, the following promotions are set up:

- Auto Entry promotion – Spend over £50, get a free gift (either a tie or a belt, each worth £12.50)

- “Normal” Promotion – Buy 1 shirt, get another at 25% off (Maximum Per Order field is set to 1 meaning the that customer can only get this promotion once)

- Promotion triggered by a Voucher – Spend over £75, get 10% off

The customer buys the following items:

- 1 shirt in NAVY for £30

- 1 shirt in GREEN for £30

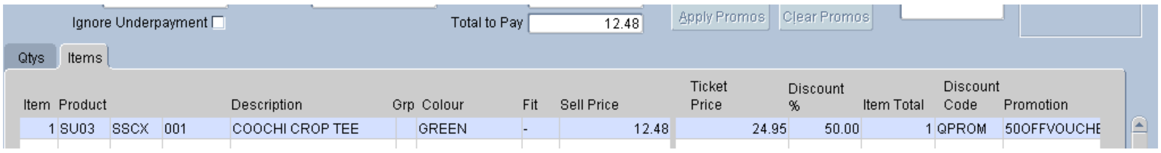
- 1 pair of trousers in GREY for £40
- Total = £100

The promotions are applied as follows:

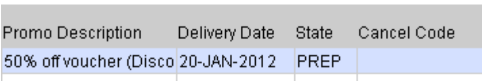
- 1 shirt in NAVY for £30
- 1 shirt in GREEN now at £22.50 (i.e. the “normal” promotion has been triggered where the customer can get a second shirt for 25% off)
- Auto Entry promotion is triggered as the customer has spent over £50 (£52.50) and the customer can select either a tie or a belt from the list available. A tie is chosen.
- 1 pair of trousers in GREY for £40
- Voucher promotion added as the customer has now spent over £75 (£92.50) and therefore qualifies for a further 10% off.
- This makes the final total £83.25; a saving of £16.75.

2.9. Items Tab

As explained previously in sections 2.6 and 2.7, this tab shows additional information about the product that has been ordered. The only block that changes on the screen are the columns to the right of the Sell Price field in the Items block:



Additional fields to the right of the screen when using the scroll bar:



Field	Description
Ticket Price	This is the original price on the price list, as defined in the header block, prior to any discounts being applied.
Discount %	This shows the discount % that has been applied. If one has been defined in the header, this will be shown in this field.
Item Total	This will be populated at the point the order is confirmed (see section 2.10).
Discount Code	If a discount % has been inserted, this will show the discount reason code.
Promotion	If a promotion has been applied to the order line item, the code will be displayed in this field e.g. 1SHT125OFF
Promo Description	If a promotion has been applied to the order line item, the full description of the promotion will be displayed in this field. This will only be completed if the Promotion field has been completed.
Delivery Date	This is the delivery date calculated using the received date and the lead time defined for the product.
State	This is the state of the order line item.

Cancel Code	If an order line item has been cancelled, the reason for this cancellation will be shown in this field.

2.10. Adding Sundry Costs

Sundry costs are extra costs that are added to an order e.g. gift wrapping, delivery costs etc.

In Mail Order, some sundry codes can be added to the order automatically if they are triggered by a system action e.g. a promotional sundry code or a delivery sundry code. Other sundry codes can be manually added e.g. gift wrapping.

In eCommerce, only system triggered sundry costs will be added; customers will not be able to add in further sundry codes like gift wrapping to the order. This functionality is planned to be added in a future release of CIMS.

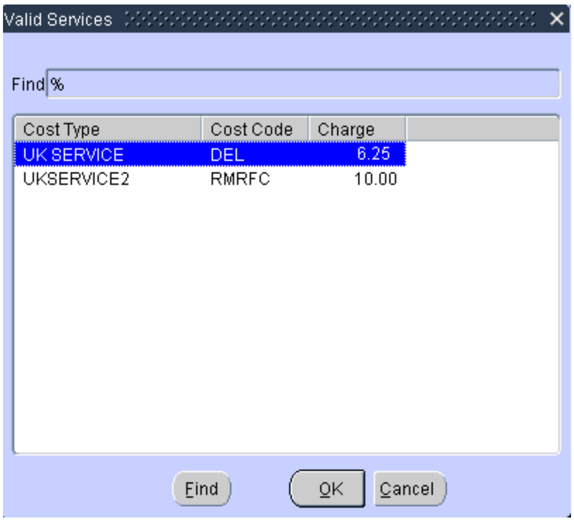
- Click on the **Sundries** button; a new screen will appear and the layout will depend on whether or not the business is validating the carriers it is using

  The following screenshot shows how the screen will look if the business is validating carriers. The top block is relevant in this case and a delivery charge will be automatically populated. The bottom block is used for additional sundry costs like gift wrapping:

- Check the delivery charge that has been applied automatically. It can be changed if required. For example, an order qualifies for Standard Delivery at £6.25 and 1st Class Recorded Delivery £10.00. Standard Delivery is a higher priority than 1st Class Recorded Delivery and so appears automatically.

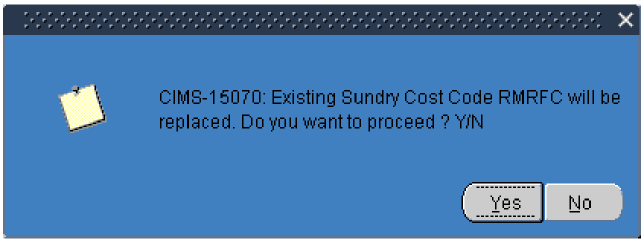
- To change the delivery cost, click on the **Calculate Delivery Charge** button and the following screen will appear:

- F9 List Values to see a list of valid services i.e. delivery options that are applicable to this order:

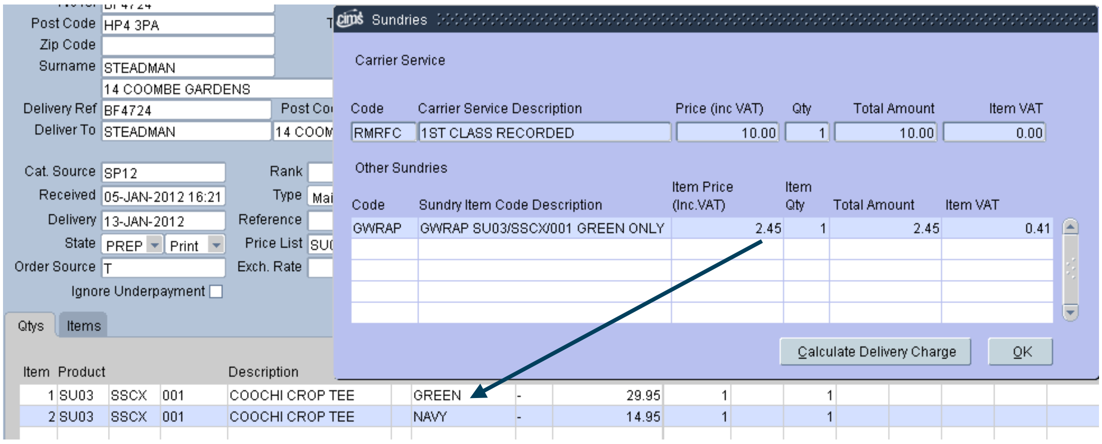


NOTE: users will need to know the details behind the different cost types and codes that are available so that the correct information can be offered to the customer. For example code DEL relates to Standard Delivery and RMRFC relates to 1st Class Recorded.

- Select the required delivery service e.g. the customer wants to pay extra for 1st Class recorded delivery and so the UKSERVICE2 costing £10.00 has been selected
- The following message will be displayed:



- Click on OK; you will be taken back to the sundries pop up screen and the carrier service will have been changed
- F10 Commit
- Move to the bottom block to add other sundry costs e.g. gift wrapping.
- F9 List Values on the **Code** field and select as appropriate; the price per item will be populated automatically
- Add a quantity in the **Item Qty** field
- Check the **Sundry Item Code Description**; it will be populated automatically as soon as the code is selected but can be changed if required. For example, you may have ordered 2 items of which you only want 1 of them to be gift wrapped. The Sundry Item Code Description should be changed to provide this information:



- F10 Commit; the header will be updated with the extra costs

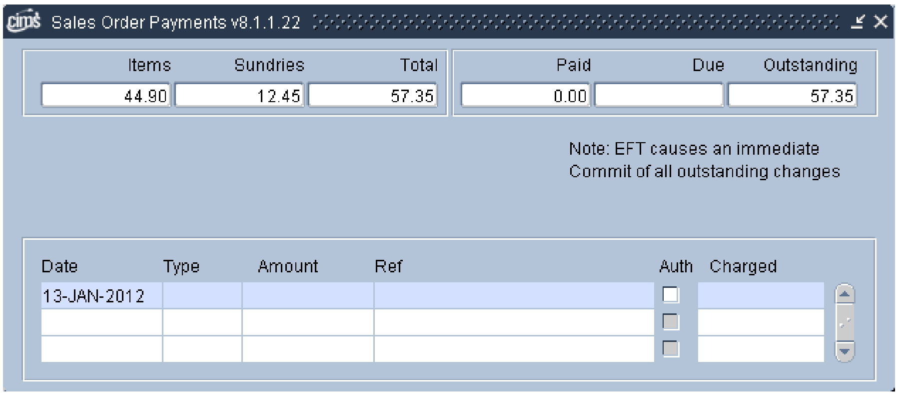
NOTE: only one instance of a Sundry Cost can be applied to an order. In addition, the sundry code selected as the default Gift Card Sundry Code in HS9A Master Control Table, cannot be added as a sundry cost in this screen.

2.11. Confirming the order

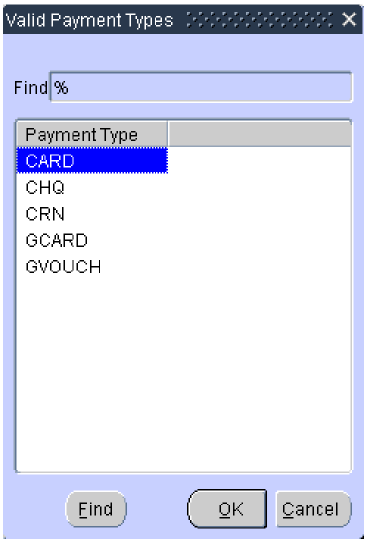
- Click on the **Confirm Order** button. This will change the state of the order from PREP to LIVE and will open the order payment window. The Item Total on the Items tab will also now be populated.

2.12. Taking Payment

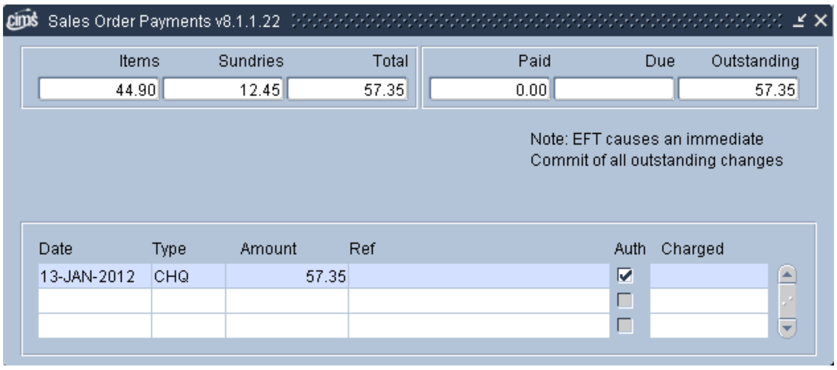
- Click on the **Payment** button. Once you have clicked on this button, you are prevented from deleing the order from this screen.



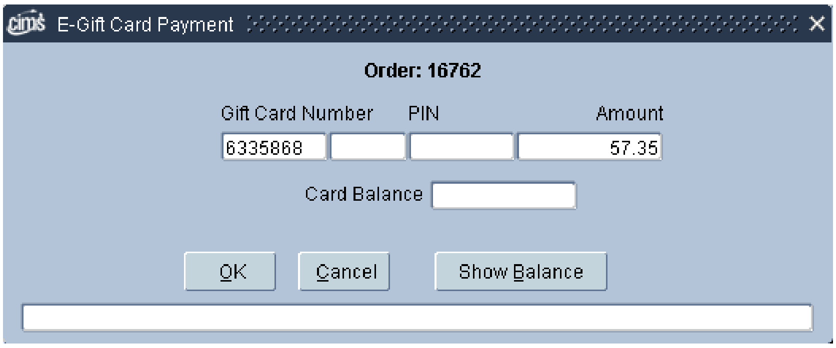
- F9 List Values on the **Type** field and select the payment type



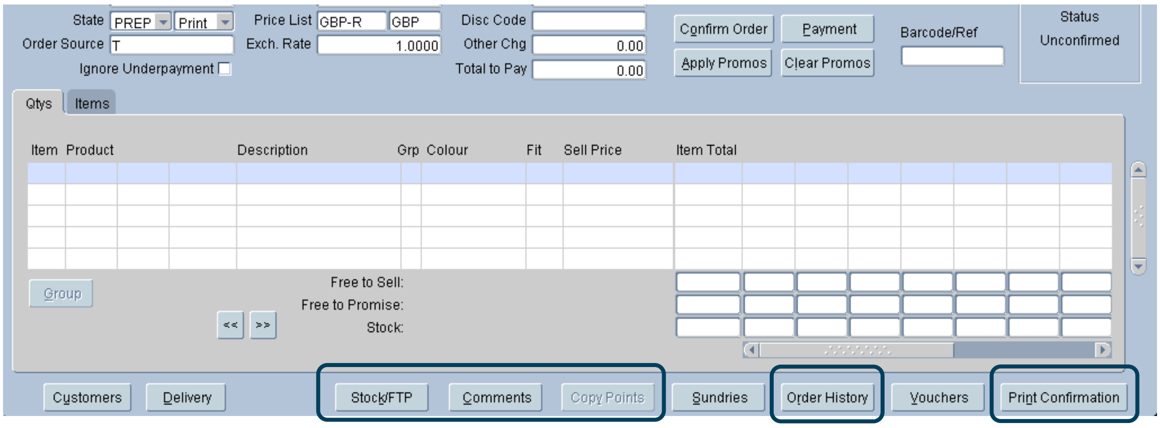
- If the customer is paying with a card, you will be taken automatically to the EFT screen where the transaction can be completed
- If the customer is paying with a cheque, enter the value in the Amount box, tick the Auth tickbox and F10 Commit



- If the customer is paying with a gift card, the following window will appear where the transaction can be completed

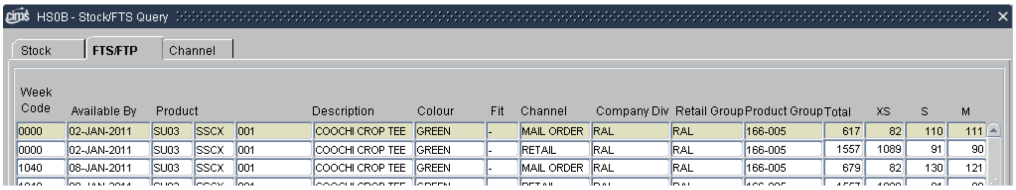


2.13. Additional buttons



2.13.1. Stock/FTP

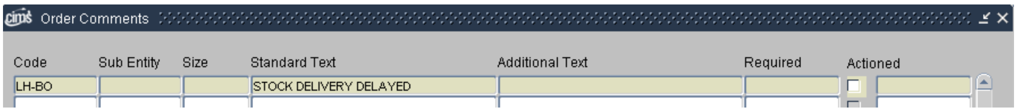
Clicking on the Stock/FTP button will bring up a popup screen showing the stock and FTP position for the product (the screen is actually HS0B Stock/FTS Query – see section 7.3).



This button is only relevant for Home Shopping Orders; it is not relevant for Special Orders.

2.13.2. Comments

Clicking on the Comments button at the bottom of the screen will display the comments linked to this order.



2.13.3. Copy Points

In PD0A Product Entry, you can list a number of key points against a product that are important when selling. For example, if you are selling a sofa, you may need to ask the following questions:

- What fabric do you want?
- What colour do you want?
- Do you want the same colour loose cushions or the contrasting colour loose cushions?
- What type of feet do you want for the sofa?

This button copies all of these points from PD0A Product Entry to this screen.

2.13.4. Order History

This takes you to HS0E Order History Query screen (see section 7.1).

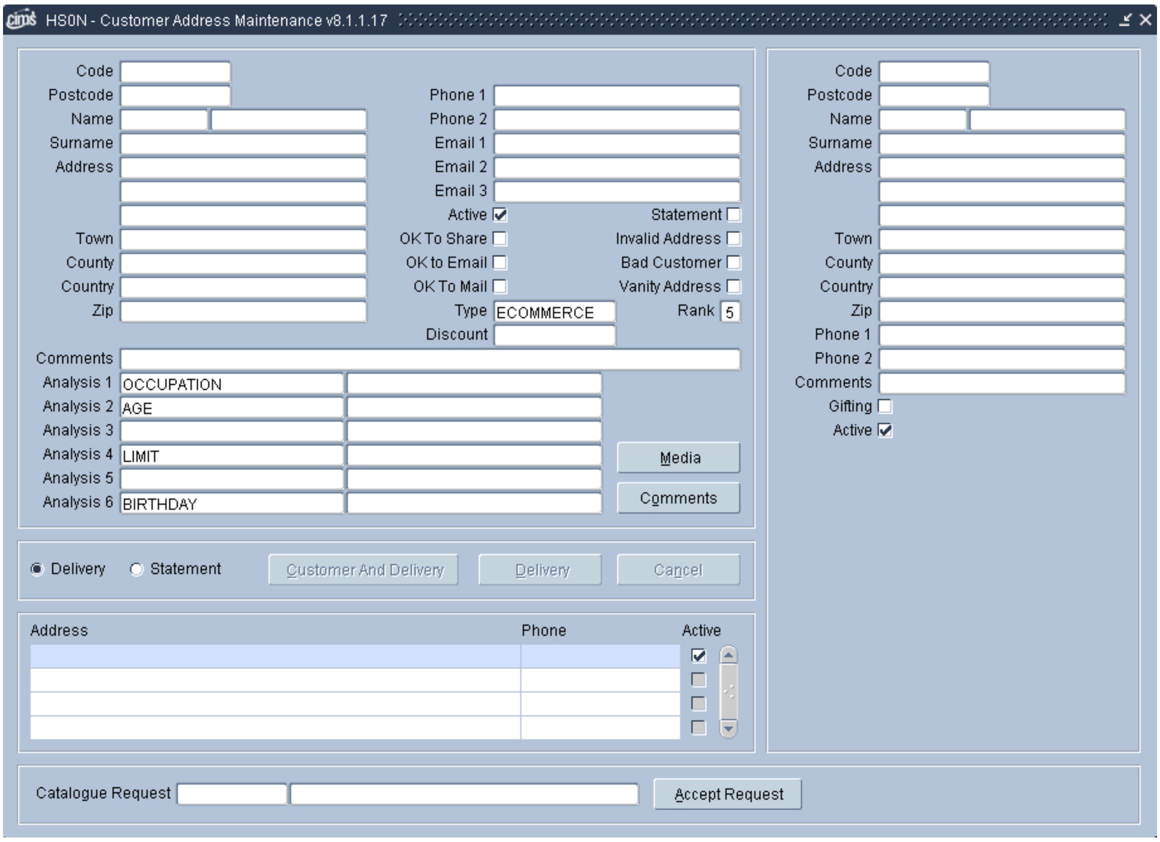
2.13.5. Print Confirmation

A printout confirming the order is available. For Home Shopping orders, this will be produced infrequently and is likely to be for internal use only e.g. printing out the order to take down to the warehouse to check that something has been packed correctly. However for Special Orders, this could be given to the customer.

3 HS0N – CUSTOMER ADDRESS MAINTENANCE

This screen can either be accessed in its own right, or called from other screens like HS0A Home Shopping Order Entry or HS7B Home Shopping Amendments. It displays a single customer address record, allowing queries to be raised across all of the base customer fields.

This section describes each of the fields on screen; sections 2.2 and 2.3 show how this screen is used when placing an order using HS0A Home Shopping Order Entry.



If the screen is called from HS0A Home Shopping Order Entry, it will be presented in one of two modes:

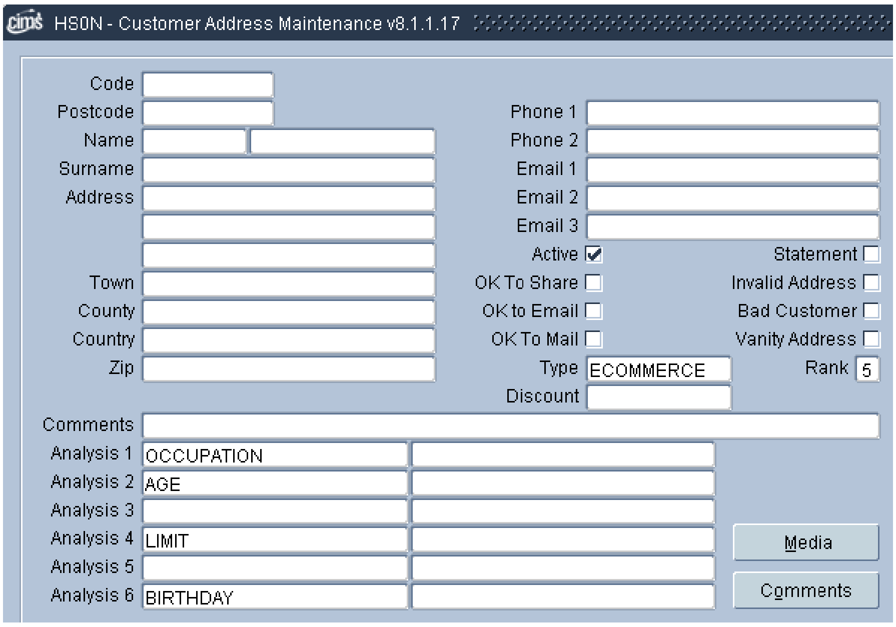
Mode 1 – during initial order capture

During order entry and prior to an Order ID being assigned, no customer is committed to the order and so in this mode, you will be allowed to select, change and return any valid customer account. Once selected, HS0A Home Shopping Order Entry will be updated with the customer's unique account reference and details. After the order has been created and the customer selected, (i.e. it now has an order ID), it is no longer possible to change the customer account even if the order is in a state of PREP (unconfirmed). Mode 2 will need to be used instead.

Mode 2 – order is being modified

As the customer has already been selected and an order ID has been created, the details of the customer will be displayed when this screen is accessed. Whilst a different customer cannot be selected for the order, the details for that customer account can be amended e.g. select an alternative delivery address.

3.1. Customer Address Details block



This block is used to set up the address and contact details for the customer.

Most of the fields in this block can be queried once a customer has been created. On some of the fields, greater intelligence has been applied so that the relevant customer can be found more quickly. For example on the Phone 1 field, only the numeric part excluding leading zeros of the entered data is compared, so that if you enter a phone number that contains spaces and the source data doesn't contain spaces, the phone number will still be found. See the table below for some examples:

Query Request	Number in Database	Stripped Number	Match?
01442 876 277	+44 1442 876 277	441442876277	Yes
	1442 876 277	1442876277	Yes
	(01442) 876 277	1442876277	Yes
	(01442) 876-277	1442876277	Yes
	(01442)876277	1442876277	Yes
	(01442) 876 277 ext 255	1442876277255	Yes
(0)1442 876 277	+44 1442 876 277	441442876277	Yes
	1442 876 277	1442876277	Yes
	(01442) 876 277	1442876277	Yes
	(01442) 876-277	1442876277	Yes
	(01442)876277	1442876277	Yes
	(01442) 876 277 ext 255	1442876277255	Yes
+44 01442 876 277	+44 1442 876 277	441442876277	No
	1442 876 277	1442876277	No
	(01442) 876 277	1442876277	No
	(01442) 876-277	1442876277	No
	(01442)876277	1442876277	No
	(01442) 876 277 ext 255	1442876277255	No

Another example is postcode where all spaces and non-alpha, non-numeric characters have been excluded meaning that if you enter HP4 3PA, the system will use HP43PA as the query.

Field	Description
Code	This is the account code of the customer.
Postcode	If the screen has been accessed via another screen, the postcode will already be populated. If it has been accessed directly, enter the postcode. Do not tab to the next field; click on F9 List Values instead and this will allow you to look up the full address from the Post Office Address File (PAF). NOTE: this feature only applies to addresses in the UK. Selecting an address from the list will copy the information into the relevant address fields and will overwrite any pre-existing information. The exception to this will be if an account code is already showing. A message prompt will appear saying "Do you want to replace the Address details for this customer with the PAF data selected?" to which you would click on either Yes or No.
Name <2 fields>	These are mandatory fields and are the title and first name of the customer e.g. MRS in the first field and LUCY in the second field.
Surname	This is a mandatory field and is the surname of the customer.
Address	If the address has been located using the postcode, this field will already be populated. It is a mandatory field and is the first line of the address e.g. 14 Coombe Gardens.
Town	If the address has been located using the postcode, this field will already be populated. This is a mandatory field and is the town e.g. Berkhamsted.
County	If the address has been located using the postcode, this field will already be populated. However, this is not a mandatory field.
Country	If the address has been located using the postcode, this field will already be populated. This is a mandatory field and is the country e.g. UK.
Zip	If the address is overseas, it may be more appropriate to capture the postal code in this field. However, the field is not mandatory.
Phone 1	This is the primary telephone number and is mandatory when you are either creating or amending a customer's records. However in older versions of CIMS, this field was not mandatory and therefore there may be some records where this is blank. NOTE: if a query is raised, all records will be returned regardless of whether Phone 1 is blank or not.
Phone 2	This can be used to enter an alternative contact number but is not a mandatory field.
Email 1	Up to 3 email addresses can be entered, although none of these are mandatory fields.
Email 2	
Email 3	

Field	Description
Active tickbox	This denotes whether the customer is active or not. A customer cannot be deleted once created, but can be set inactive.
OK to Share tickbox	This means that the customer has agreed that the information obtained about them can be shared with third parties. The default setting for this field comes from HS9A Master Control Table.
OK to Email tickbox	This means that the customer has agreed to receive email communication. The default setting for this field comes from HS9A Master Control Table.
OK to Mail tickbox	This means that the customer has agreed to receive communication by post. The default setting for this field comes from HS9A Master Control Table.
Statement tickbox	This denotes whether or not the customer address is the statement address.
Invalid Address tickbox	This is for information purposes only and is used to identify when the address is invalid for some reason e.g. the parcel is returned to the post office because the address is unknown.
Bad Customer tickbox	If the customer is considered “bad” e.g. doesn’t pay on time, has a high number of returns etc., then this tickbox can be ticked. This will then work the “bad guy” flags defined in HS9A Master Control Table to determine whether or not orders can be raised for this customer.
Vanity Address tickbox	This is for information purposes only. A vanity address is one that is not recognised by postal services but can still be delivered to e.g. the vanity address is Fir Trees, Coombe Gardens, Berkhamsted, Hertfordshire HP4 3PA but the actual postal address is 14 Coombe Gardens, Berkhamsted, Hertfordshire HP4 3PA.
Type	This is the customer type that the customer belongs to. The default will come from the Default Customer Type field in HS9A Master Control Table, although can be changed if required. F9 List Values is available. This is not used by the home shopping process but can be picked up in CIMS reporting if required.
Rank	This is the default rank for the order. This will be automatically populated as 5 and typically businesses choose to leave this as 5. The rank is then brought through onto the order and can be changed at this stage if required (see section 2.4 for information on how the Rank field is used).
Discount	If this customer receives a discount, it can be entered in this field.
Comments	This is used to enter an internal comment relating to the customer’s address.
Analysis 1, 2, 3, 4, 5 & 6	These are the standard Customer Analysis Codes for the customer. The titles of the codes will have been previously set up in NA9A Master Control Table and the values against each analysis code will have been set up in NA9M Location/Customer Analysis Codes.
Media button	This is connected with the Alerts functionality that can be used to inform the customer when something has happened to the order e.g. delivery date has been

Field	Description
	delayed by 6 weeks. Use F9 List Values to choose the preferred method of contact for this customer – the options shown come from CV1H Document Type Control (Media Preference button) and are: • Letter • No Media • Text Email • HTML Email
Comments button	If you click on this button, a pop up window will appear that will allow further internal comments to be set up against the customer.

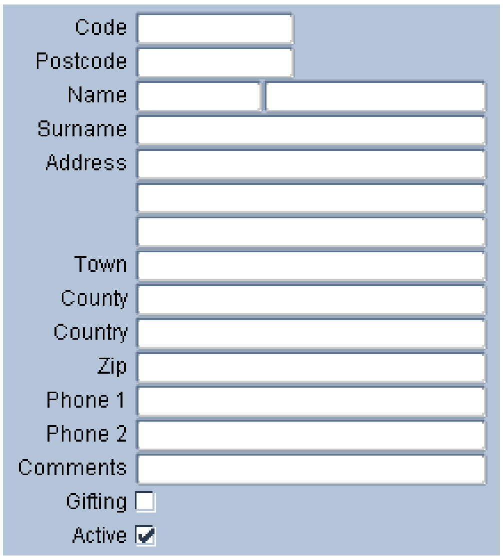
3.2. Delivery/Statement block

This block works in conjunction with the alternative addresses block to the right of the screen.

Field	Description
Delivery radio button **Statement radio button**	If the address being entered in the alternative addresses block is a delivery address, the delivery radio button should be selected. The statement radio button should be selected if the address being entered is the statement address.
The following three buttons control the use of customer and delivery addresses when HS0N Customer Address Maintenance is accessed from a different screen e.g. HS0A Home Shopping Order Entry. The buttons will only be enabled in certain circumstances.	
Customer and Delivery button	This will only be enabled where the customer has changed and the screen was accessed from another screen (but not from HS7B Home Shopping Amendments). If this button is selected, it will pass back the currently selected customer and delivery address. Before this change is applied, you will be provided with a warning prompt telling you that are about to amend the address details for this order and do you want to continue. Once acknowledged, you will be automatically taken back to the original screen.
Delivery button	This will only be enabled when the delivery address has been altered since the screen was accessed from another screen. This could be in conjunction with the customer changing or not. If this button is selected, it will pass back the currently selected delivery address. Before this change is applied, you will be provided with a warning prompt telling you that you are about to amend the address details for this order and do you wish to continue? Once acknowledged, you will be automatically taken back to the original screen.
Cancel button	This option returns the original customer and/or delivery address regardless of what has been selected in the screen, resulting in no change to the information on the

Field	Description
	original screen.

3.3. Delivery Address block



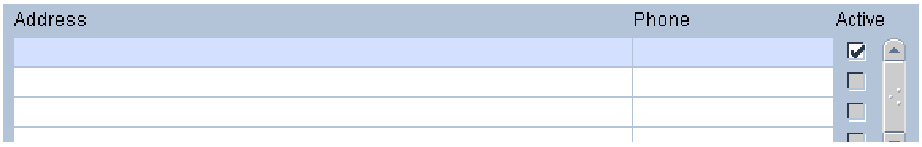
This block works in conjunction with the previous block and allows you to set up alternative addresses. If alternative addresses have already been set up, these will appear in the List of Delivery Addresses block (see section 3.4); this block will display whichever address is highlighted.

If the address being entered is a new statement address, click on the Statement radio button in the Delivery/Statement block. If the address being entered is a new delivery address, click on the Delivery radio button instead.

Field	Description
Code	These fields work in the same way as those on the main customer address block. Postcode lookup is available on the postcode field, as described previously. If a different name to the main block is entered in the delivery address block, the system will recognise this and the Gifting tickbox will be ticked automatically. However, this can be un-ticked if required. If the same name as in the main block is entered, the Gifting tickbox can still be ticked.
Postcode	
Name <2 fields>	
Surname	
Address	
Town	
County	
Country	
Zip	
Phone 1	
Phone 2	
Comments	This is used to enter internal comments against the delivery address and can be updated as required.
Gifting	If ticked, certain details on the original order will be suppressed on the letter copy sent with the ordered items. For example, the price of goods and payment methods are typically excluded on any customer letter destined for a gift address. A second copy of this letter is automatically produced for delivery to the customer that originally ordered the goods and will include any details hidden from the gift recipient

Field	Description
Active	This denotes whether the delivery address is active or not.

3.4. List of Delivery Addresses block



This shows a list of all addresses created.

Field	Description
Address	This is the first line of the address.
Phone	This is the phone number.
Active tickbox	This shows whether the address is active or not.

NOTE: the full details of the address highlighted in this block will be displayed in the Delivery Address block (see section 3.3).

3.5. Catalogue Request block

This allows you to generate a catalogue request against a customer.

Field	Description
Catalogue Request <2 fields>	F9 List Values is available and will enable you to find the valid list of catalogues to choose from.
Accept Request button	Once the catalogue has been entered, click on the Accept Request button, which will action the request. At this point, the code will be removed from the Catalogue Request field and will be displayed to the right of the Accept Request button as confirmation. This information will only be displayed whilst the screen is still on the same customer – as soon as you exit, or change the customer, this information will disappear.

3.6. Last Mailed information

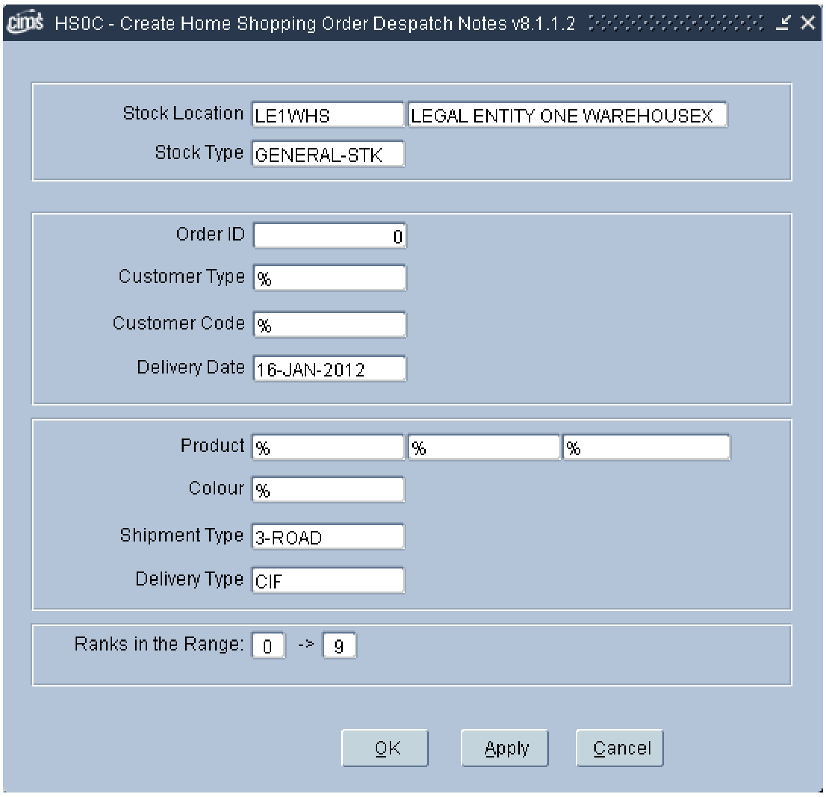
If a customer has been mailed previously, this information will appear on screen:

No information will appear if the customer has not been mailed previously.

4 HOME SHOPPING ORDER MAINTENANCE

This section describes processes that need to be run during the overnight routines, housekeeping routines and query screens.

4.1. HS0C – Create Home Shopping Despatch Notes



This screen is used to create Home Shopping despatch notes. Typically, this program is queued up to run overnight, although it can also be run during the day if required.

Most of the parameters in this screen will be populated already using defaults set up in HS9A Master Control Table. However, they can all be changed; F9 List Values is available on the majority of the fields.

The default is to run the program for all LIVE orders in HS0A Home Shopping Order Entry. This is done by entering a zero in the Order ID field (as shown in the screenshot). It can be also be run for an individual order number by entering the specific ID in the same field.

4.2. HS0G – Complete Despatches

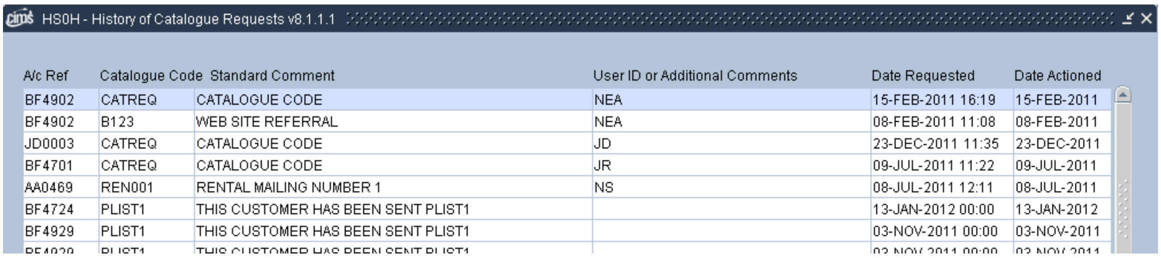
This routine completes the despatches and must be queued up to run overnight straight after HS0C Create Home Shopping Despatch Notes.

If the HS0C program is run during the day, HS0G Complete Despatches must also be run during the day.

If the tickbox against Send Payments for charging and activate Gift Cards is ticked, gift cards are activated and loaded prior to EFT charges being submitted.

In V8.1, orders with zero value payment lines are now included.

4.3. HS0H – History of Catalogue Requests



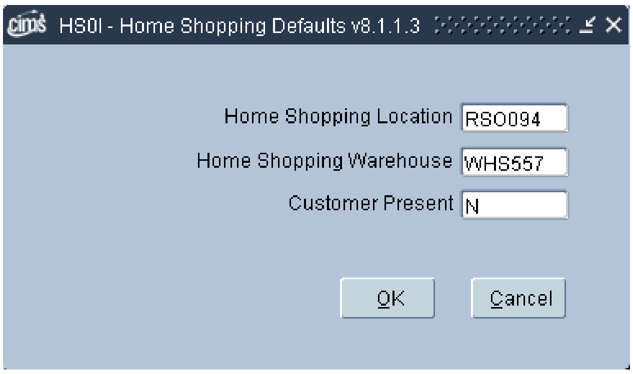
A/c Ref	Catalogue Code	Standard Comment	User ID or Additional Comments	Date Requested	Date Actioned
BF4902	CATREQ	CATALOGUE CODE	NEA	15-FEB-2011 16:19	15-FEB-2011
BF4902	B123	WEB SITE REFERRAL	NEA	08-FEB-2011 11:08	08-FEB-2011
JD0003	CATREQ	CATALOGUE CODE	JD	23-DEC-2011 11:35	23-DEC-2011
BF4701	CATREQ	CATALOGUE CODE	JR	09-JUL-2011 11:22	09-JUL-2011
AA0469	REN001	RENTAL MAILING NUMBER 1	NS	08-JUL-2011 12:11	08-JUL-2011
BF4724	PLIST1	THIS CUSTOMER HAS BEEN SENT PLIST1		13-JAN-2012 00:00	13-JAN-2012
BF4929	PLIST1	THIS CUSTOMER HAS BEEN SENT PLIST1		03-NOV-2011 00:00	03-NOV-2011

This shows the history of catalogue requests by account reference. All fields can be queried except for Standard Comment. The User ID and Additional Comments fields are case sensitive. The Date Requested field is made up of the date and the time. If you want to search for a specific date but don't know the time, % must be entered at the end directly after the e.g. 06-DEC-2011%. If you want to search for a specific date and time, % must be entered in between the 2 elements e.g. 06-DEC-2011%00:00.

4.4. HS7C – Held Order Release

This screen is used to manage underpaid and held orders. Two tabs are available, relating to each option.

When you first enter HS7C, a pop up window may appear asking you to confirm the Home Shopping Location, the Home Shopping Warehouse and if the Customer is present or not. This window is actually HS0I Home Shopping Defaults.

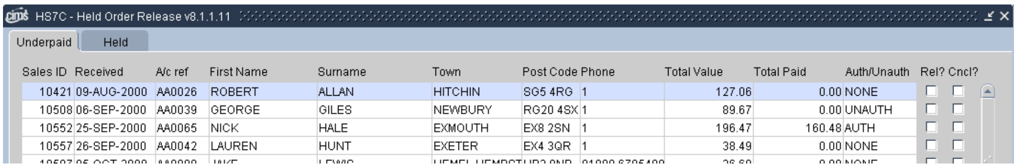


Complete the details as required and click on OK. You will then be taken to the main HS7C form showing the Underpaid tab:

4.4.1. Underpaid Tab

F12 Execute Query and all orders (non-EFT) that have been underpaid, will appear.

Typically, this screen will be used to query underpaid orders of a certain state e.g. find all orders put onto the system in %-APR-2008, where the Auth/Unauth is set as NONE. This will return all orders from April where there are no payments received.

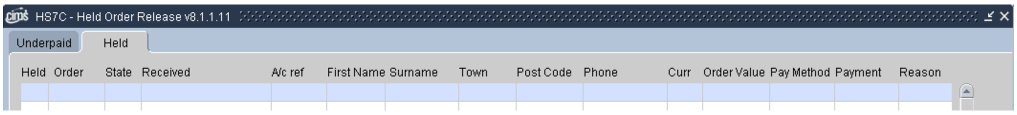


Field	Description
Sales ID	These fields are for information purposes only; they can be queried.
Received	
A/C ref	
First Name	These fields are for information purposes only; they cannot be queried.
Surname	
Town	
Post Code	This field is for information purposes only; it can be queried.
Phone	
Total Value	These fields are for information purposes only; they cannot be queried.
Total Paid	
Auth/Unauth	This field shows the state of the payment and is for information purposes only; it can be queried. There are 4 valid states: • NONE – this means that no payment has been received • UNAUTH – this means that payment has been received, but it has not yet been authorised e.g. cheque • AUTH – this means that some payment has been received, but there is not enough payment to be able to release the order • BOTH – this is a mixture of auth and unauth e.g. there may be enough money to cover the order, but some of it is not authorised.
Rel?	This will be blank on entering this screen, but will be ticked at the point the order is released.
Cncl?	This will be blank on entering this screen, but will be ticked at the point the order is cancelled.
Payment button	Clicking this button enables you to obtain more payment from the customer via EFT.
Release button	Clicking this button releases the despatch regardless of underpayment. The Rel? box will be ticked as soon as the release has been confirmed.
Cancel Order button	Clicking on this button will cancel the balance of the order. The Cncl? box will be ticked as soon as the cancellation has been confirmed

4.4.2. Held Order tab

This tab shows the following information:

- All held orders in a state of PREP for a bad customer, where the Prevent Live Orders for Bad Customers radio button in HS9A Master Control Table is set to YES
- All held orders without a despatch in a state of PREP for a bad customer where the Prevent Allocation of Stock for Bad Customers tickbox in the Master Control Table is ticked
- All held orders with a despatch in a state of PREP for a bad customer where the Prevent Orders Being Picked for Bad Customers tickbox in the Master Control Table is ticked



Field	Description
Held	This field is for information purposes only; it can be queried. Typically, this field will be blank, but if the order is held because it relates to a bad customer, it will be set to B.
Order	These fields are for information purposes only; they can be queried.
State	
Received	
A/C Ref	
First Name	These fields are for information purposes only; they cannot be queried.
Surname	
Town	
Post	These fields are for information purposes only; they can be queried.
Phone	
Curr	This field is for information purposes only; it can be queried. This is the currency of the order.
Order Value	This field is for information purposes only; it can be queried.
Pay Method	These fields are for information purposes only; they cannot be queried.
Payment	
Reason	
Comments button	This button will display a pop-up window showing all of the customer's comments and order comments combined. The order comments will be displayed prior to the customer's comments.
Release button	This button releases the despatch regardless of underpayment. The Rel? box will be ticked as soon as the release has been confirmed.
Cancel Order button	This button will cancel the balance of the order. The Cncl? box will be ticked as soon as the cancellation has been confirmed
History button	This button will open up the Order History form for the order highlighted in the main block. Exiting the Order History screen will return you to the Held Orders screen.

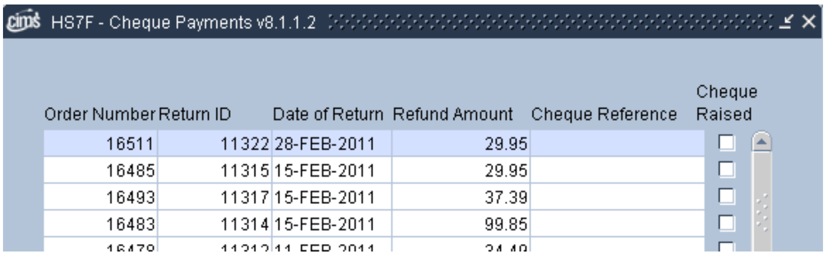
The held orders will not be sent for EFT authorisation until the order has been released through this screen. Once an order has been released for processing, the PREP despatch will trigger full authorisation and the normal payment controls will apply to the order and despatch.

Once the order has been completed, the housekeeping routine will reset the held flag state back to NULL to ensure that any further processing that re-opens the order, must go back through Bad Guy status controls where applicable.

4.5. HS7F – Cheque Payments

This screen shows all the cheques that need to be refunded.

- Find the relevant Order Number and enter the cheque number in the Cheque Reference box
- Tick the Cheque raised tickbox
- F10 Commit; the relevant row will then be removed from the screen.



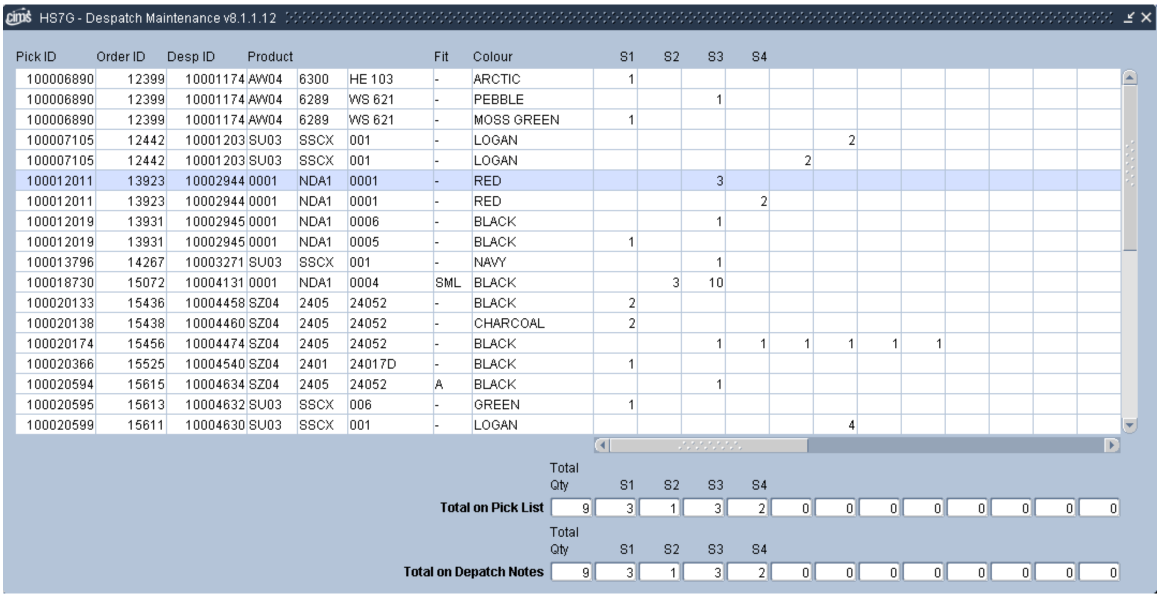
Order Number	Return ID	Date of Return	Refund Amount	Cheque Reference	Cheque Raised
16511	11322	28-FEB-2011	29.95		☐
16485	11315	15-FEB-2011	29.95		☐
16493	11317	15-FEB-2011	37.39		☐
16483	11314	15-FEB-2011	99.85		☐

4.6. HS7G – Despatch Maintenance

When a Home Shopping despatch has been created, it cannot be amended within module DI Distribution and Invoicing. Changes must be made in HS7G Despatch Maintenance.

NOTE: the screen can only be used to reduce the despatch quantities. If more is required, a new order will need to be raised.

- F11 Enter Query, enter the relevant information to find the despatch and F12 Execute Query
- Reduce the quantity; the total figures at the bottom of the screen will change accordingly



HS7G - Despatch Maintenance v8.1.1.12

Pick ID	Order ID	Desp ID	Product			Fit	Colour	S1	S2	S3	S4	Col 5	Col 6	Col 7	Col 8	Col 9	Col 10	Col 11	Col 12
100006890	12399	10001174	AW04	6300	HE 103	-	ARCTIC	1											
100006890	12399	10001174	AW04	6289	WS 621	-	PEBBLE			1									
100006890	12399	10001174	AW04	6289	WS 621	-	MOSS GREEN	1											
100007105	12442	10001203	SU03	SSCX	001	-	LOGAN						2						
100007105	12442	10001203	SU03	SSCX	001	-	LOGAN					2							
100012011	13923	10002944	0001	NDA1	0001	-	RED			3									
100012011	13923	10002944	0001	NDA1	0001	-	RED				2								
100012019	13931	10002945	0001	NDA1	0006	-	BLACK			1									
100012019	13931	10002945	0001	NDA1	0005	-	BLACK	1											
100013796	14267	10003271	SU03	SSCX	001	-	NAVY			1									
100018730	15072	10004131	0001	NDA1	0004	SML	BLACK		3	10									
100020133	15436	10004458	SZ04	2405	24052	-	BLACK	2											
100020138	15438	10004460	SZ04	2405	24052	-	CHARCOAL	2											
100020174	15456	10004474	SZ04	2405	24052	-	BLACK			1	1	1	1	1	1				
100020366	15525	10004540	SZ04	2401	24017D	-	BLACK	1											
100020594	15615	10004634	SZ04	2405	24052	A	BLACK			1									
100020595	15613	10004632	SU03	SSCX	006	-	GREEN	1											
100020599	15611	10004630	SU03	SSCX	001	-	LOGAN						4						

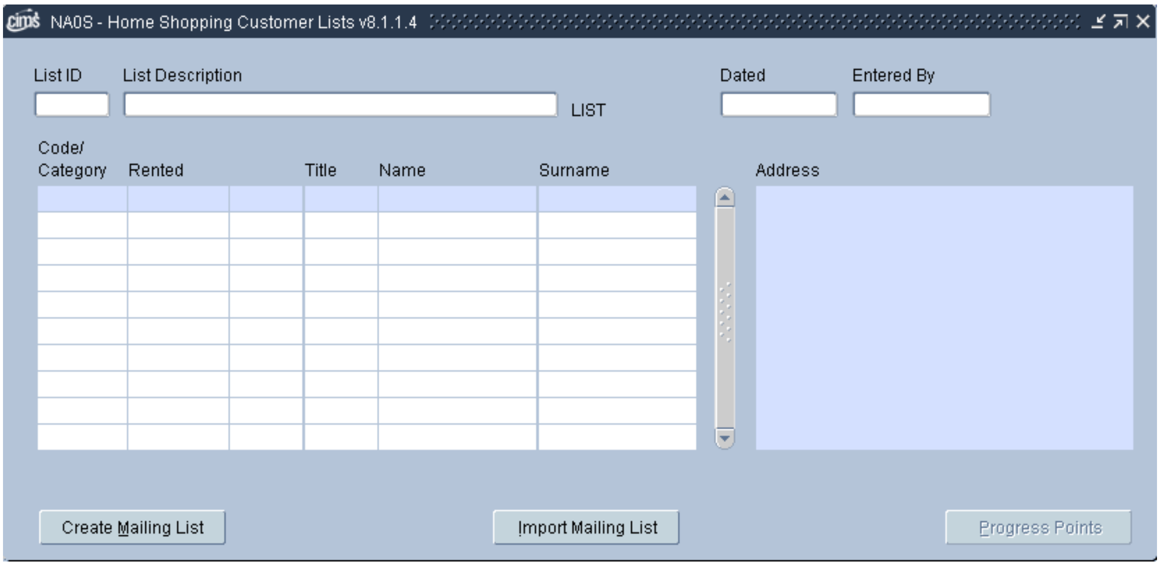
	Total Qty	S1	S2	S3	S4								
Total on Pick List	9	3	1	3	2	0	0	0	0	0	0	0	0

	Total Qty	S1	S2	S3	S4								
Total on Depatch Notes	9	3	1	3	2	0	0	0	0	0	0	0	0

5 CUSTOMER MANAGEMENT

5.1. NA0S – Home Shopping Customer Lists

This screen is used to create lists of customers for mailing purposes and can be done either manually or by importing a list (compiled using SQL or by using a rented list).



5.1.1. Manually creating a list

- Click on the Create Mailing List button; the List ID field will be automatically populated at this point and the cursor moved to the Code field
- F9 List Values to find the relevant customer and continue adding customers as required. All the other fields will be populated automatically
- F10 Commit

5.1.2. Importing a list

- Click on the Import Mailing List button. This will take you into a separate popup window and will enable you to find the list file that has been previously created

  After choosing the particular list, the information will be imported into CIMS. If the list contains valid location short codes, the entire list will be brought in and displayed in the main items block. The List ID field will be completed automatically in the system.

  If the list contains some invalid location short codes, the errors will be written to the file name .err in the same directory from where the list was being imported. Duplicates are included as errors.

  If you choose to import a file when a List ID is already showing in the top block, you will be given the choice as to whether you wish to import the list into the current list or to create a new list. If you choose to import into the current list, duplicates will be checked for.

5.1.3. Adding Progress Points

When you are happy with the list, you can then click on the Progress Point button (greyed out in the screenshot). This allows you to do one of two things:

- You can attach a particular progress point, (e.g. a catalogue reference), to all the customers in a specific list
- You can mark a particular progress point held against all the customers within the list as having been actioned. This would be done for example, when the mail shot has been completed and you want to show that this customer has been sent a particular catalogue.

To view the progress points that have been attached to a customer, you can use NA0P Customer Loyalty Maintenance. Raise a query to find the customer and then use the Contact Hist button at the bottom of the screen. This will bring back all the progress points, along with any additional comments that have been entered against the customer.

5.2. NA7B – POS Duplicates

When this is used, it suggests which customers are duplicates and which are not. It can be done across all customers or for a particular group of customers by using a customer list (see section 5.1).

NOTE: if the customer database is large, it is not advisable to do this across all customers, as it may take a long time and will then be difficult to manage in the next stage of the process.

Duplicates are determined by looking at the surname and the postcode. If the surname, after having all vowels and double letters removed, and the postcode are the same, then the record will be marked as a duplicate.

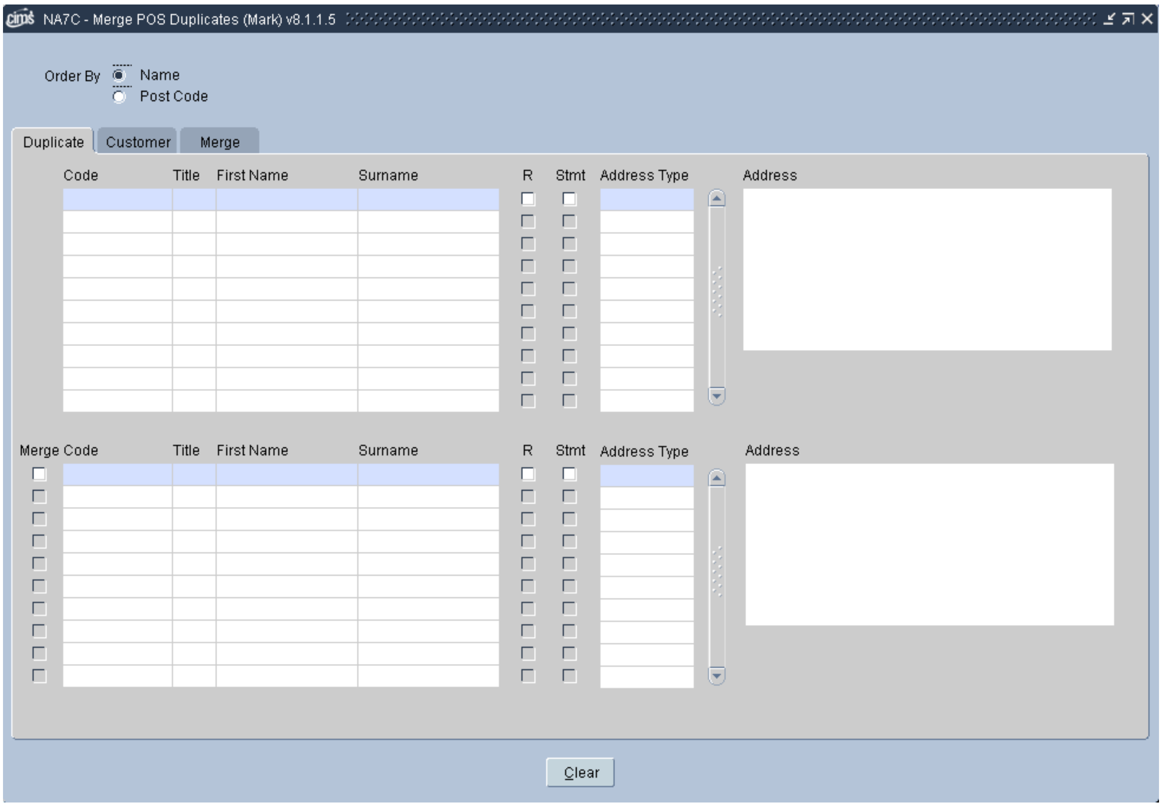
Examples

- DAVIES and DAVIS both living at RG20 0LX – these would be marked as duplicates.
- DAVIES and DAVIS with one living at HP4 2DH and the other living at RG20 0LX – this would not be a duplicate.
- SHEPHEARD and SHEPHERD both living at HP4 3PA – these would be marked as duplicates.

NOTE: only one suggested merge can be worked on at any one time.

5.3. NA7C – Merge POS Duplicates (Mark)

This screen enables the user to view the results of NA7B POS Duplicates.



The top block of the Duplicate tab shows the perceived parent of the duplicate. The second block shows all the records that are perceived to be duplicates of that parent.

Each of the duplicates will be shown as if each one were the parent record.

Example

There are 3 records, which are perceived to be the same: R.DAVIES, R.DAVIS and RJ DAVIS, all of whom live at the postcode HP4 2DH. In this instance there will be 3 header records in the top block:

- Header record R.DAVIES with items R.DAVIS and RJ DAVIS
- Header record R.DAVIS with items R.DAVIES and RJ DAVIS
- Header record RJ DAVIS with items R.DAVIS and R.DAVIES.

This gives you the opportunity to decide which record you want to keep and which record/s you want to remove. For example, if you choose to merge record 2 then you will keep R.DAVIS and all sales/returns etc. belonging to R.DAVIES or RJ DAVIS will belong to R.DAVIS; R.DAVIES and RJ DAVIS will be removed from the database. This removal happens when NA7D Merge POS Duplicates (Action) is used.

The records that require merging should have the Merge tickbox ticked in the bottom block. Once a record is marked as a merged record, it can no longer be merged with any other record, neither can it be used as a merge parent.

If required, you can use the Customer tab to view all of the POS customers and decide for yourself the ones that are duplicates. Raising a query in the top block of the Customer's tab will show all of the customers as shown in NA0P Customer Loyalty Maintenance; the same information appears in the bottom block and you can pick records that need to be merged.

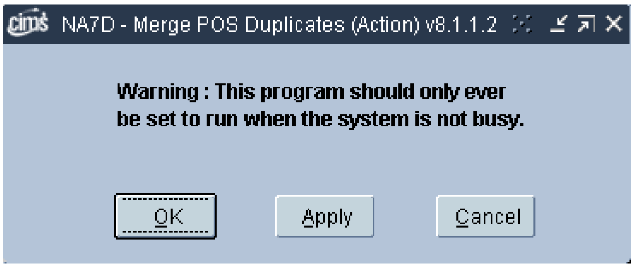
Example

A customer rings to place an order and thinks that they are on the customer database twice e.g. as N SHEPHEARD and N SHEPHERD. In this case, you should go into the Customer tab, query on SHEPHEARD in the top block and then go to the bottom block and query on SHEPHERD. You can then merge the two records together.

As you build up the customers that are to be merged, you can view this list by using the Merge tab.

5.4. NA7D – Merge POS Duplicates (Action)

This screen actions the duplicates. It should be set to run overnight, when nothing else is running and preferably immediately after the export has run. It should not be run during the day, as if a particular customer has been identified as requiring to be merged and the merge happens at the same time as they happen to be placing an order, you could end up with an order on the system that does not tie up with the customer records.

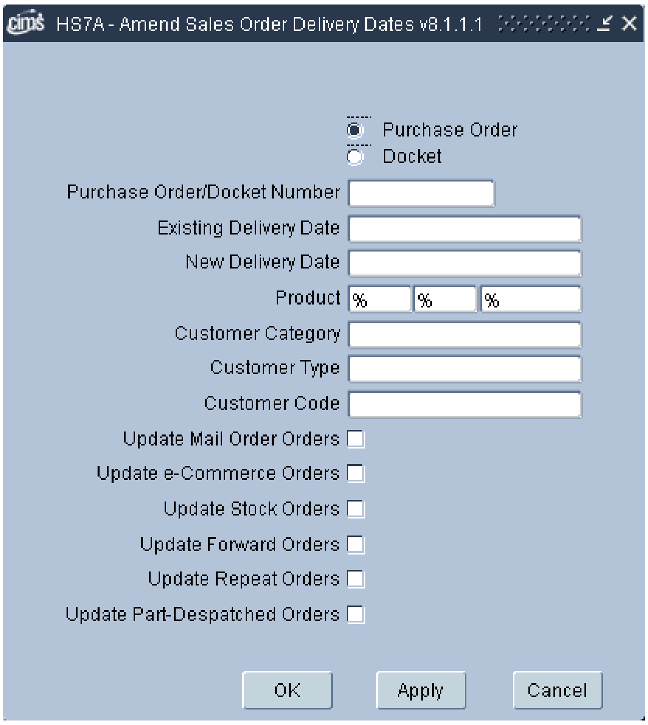


It takes all the records that can be viewed in the merge section of NA7C Merge POS Duplicates (Action) and updates all relevant tables so that the merged customer now shows as the ‘chosen’ customer. For example, if customer A was to be merged with customer B and customer A had sales orders/despatches/returns etc on the system, all of these would be updated to show that they are now for customer B. Customer A would be deleted from the system.

6 ORDER AMENDMENTS

6.1. HS7A – Amend Sales Order Delivery Dates

This screen is used to change delivery dates for an order or change dates for back orders.



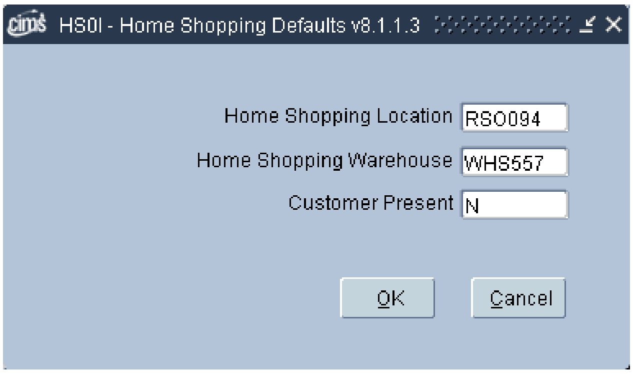
- Complete the screen as required, using wildcards where necessary.

6.2. HS7B – Home Shopping Order Amendment

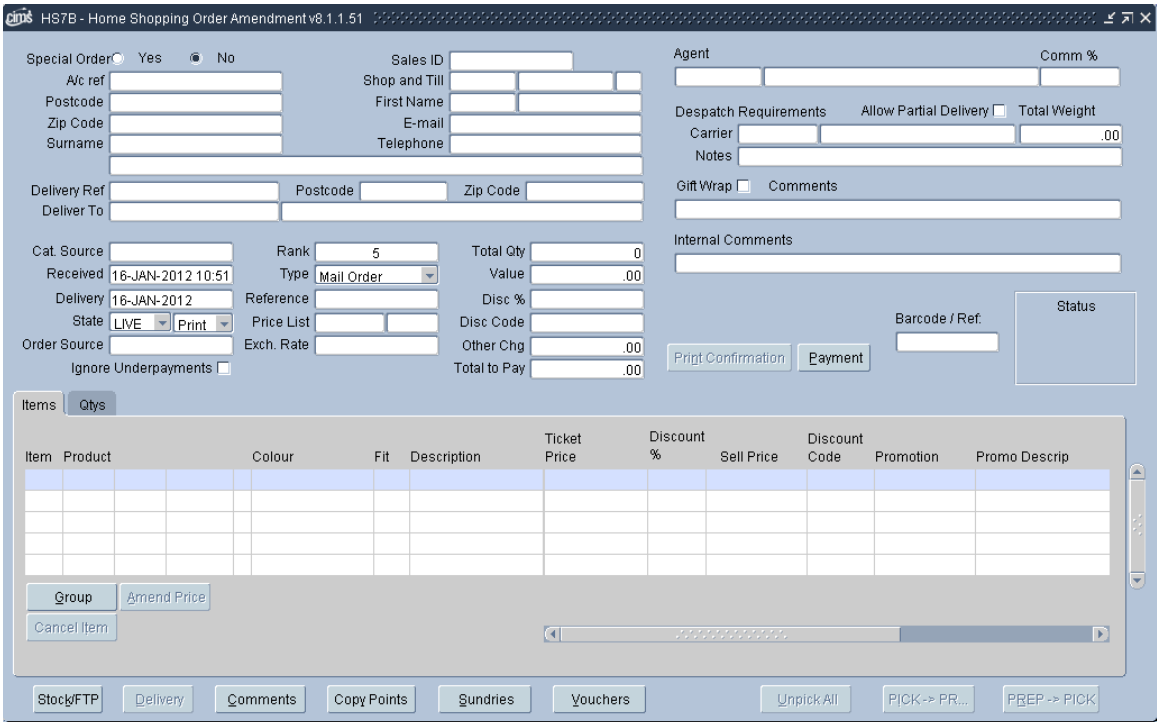
This screen is used to make changes to LIVE Home Shopping Orders. If the business is utilising the Channel Management software, this screen will take channels into account depending on the channel calculation that is in place; global or warehouse level.

When you first enter HS7B, a pop up window will appear asking you to confirm the Home Shopping Location, the Home Shopping Warehouse and if the Customer is present or not. This window is actually HS0I Home Shopping Defaults.

Once this information has been accepted, it will not be required again during the login session.



The following screen will appear:



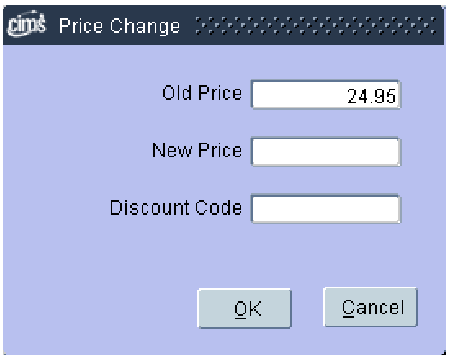
- F11 Enter Query and enter the relevant information (e.g. postcode, name, sales ID etc.) to find the order you wish to amend
- F12 Execute Query

The following sections describe the actions that can be taken.

6.2.1. Amend Price

This allows you to change the price of the item.

- Click on the **Amend Price** button in the Items block; the following screen will be displayed:



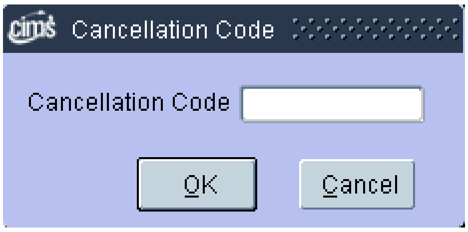
- In the New Price field, enter the new price
- F9 List Values on the Discount Code field and select

NOTE: discounts cannot be applied to a gift card purchase.

6.2.2. Cancel Item

This allows you to cancel an item.

- Click on the **Cancel Items** button in the Items block; the following screen will appear:

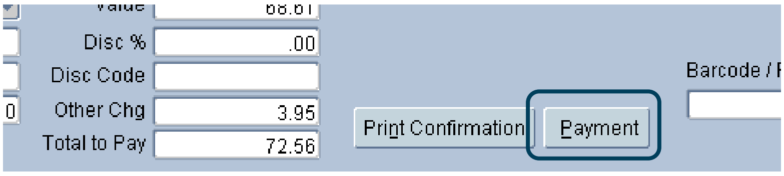


- F9 List Values and select
- Click on OK and the item will be deleted.

6.2.3. Further Payment

If products are added to an order, further payments can be collected.

- Click on the **Payment** button

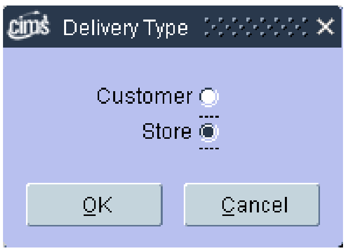


The payments window will open to allow further payments to be collected in the same way as was done originally. Customers can also pay using a gift card.

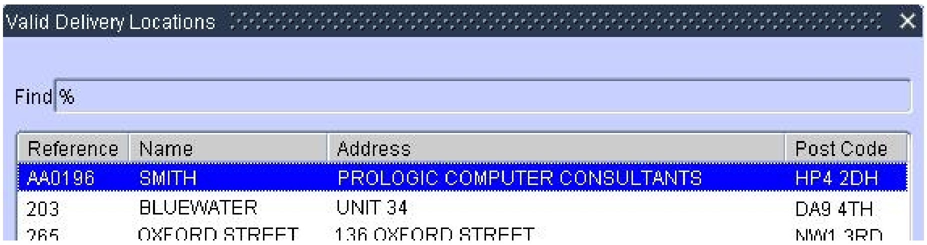
6.2.4. Delivery button

This allows you to change the delivery address.

- Click on the **Delivery** button at the bottom of the screen
- The following pop up window will appear; this has been added in V8.1 as part of the Buy & Collect process:

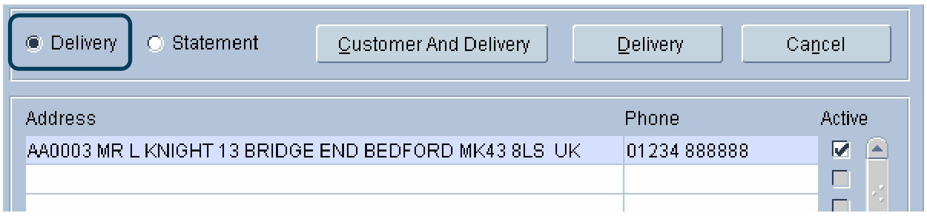


Store – if this button is selected, a pop up window will appear showing the list of valid store collection addresses, which are ordered by the store short code. Use the ↑ and ↓ arrows to find the correct address and click OK; the delivery address in the header will be updated

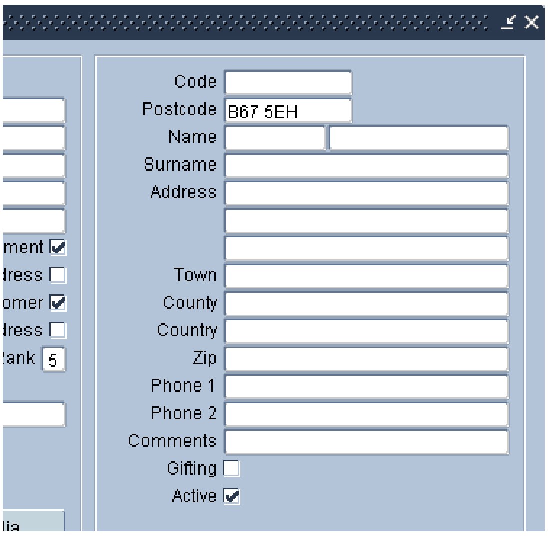


Customer – if this button is selected, you will be shown a list of customer addresses or will be taken to HS0N Customer Address Maintenance where a new customer delivery address can be created

- If HS0N Customer Address Maintenance has opened, click on the **Delivery** radio button:



- Click on the Alternative Address block, press the ↓ arrow to see a blank screen

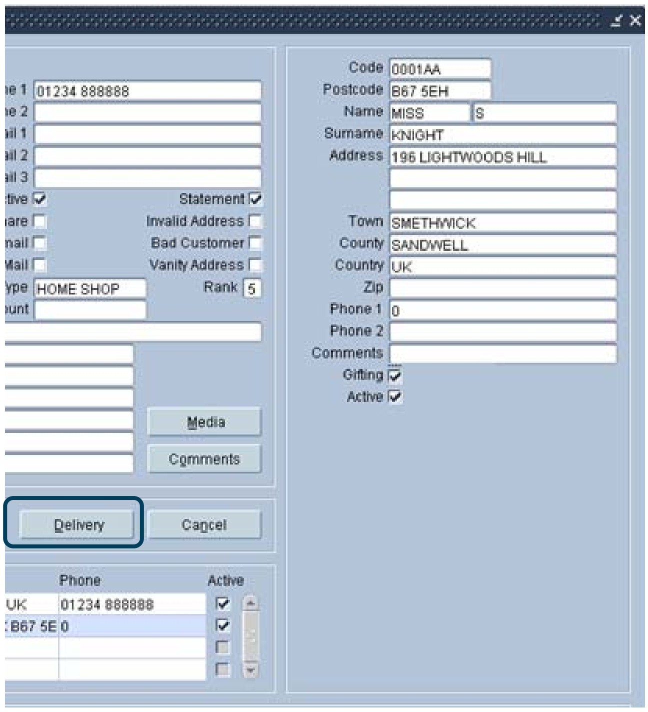


Postcode – enter the postcode of the delivery address; F9 List Values and select the relevant address. Complete other details as required e.g. **Phone 1**

Gifting – as the name and address are different, this tickbox will be automatically ticked. This means that certain information will be omitted from the delivery documentation enclosed with the goods. However the tickbox can be un-ticked if required

Active – leave the tickbox ticked

- F10 Commit
- Press the **Delivery** button



- You will be taken back to HS7M Home Shopping Order Amendment where the delivery address details will have changed:

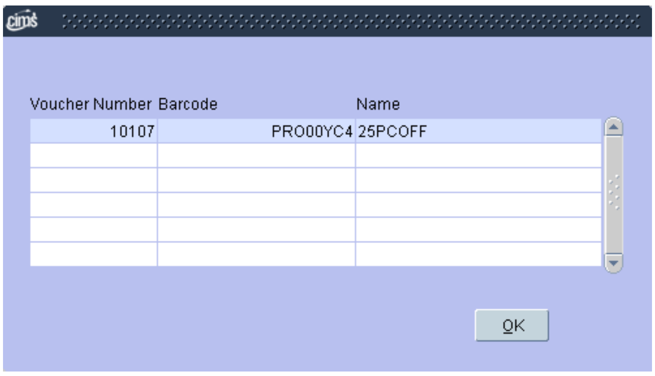
6.2.5. Sundries button

This button is used to add additional sundries to an order. Existing sundries can be removed if they have not been paid for e.g. the order has failed authorisation for some reason and therefore hasn't gone as far as the pick/despatch stage.

The sundry code selected as the default Gift Card Sundry Code in HS9A Master Control Table cannot be added as a sundry cost in this screen

6.2.6. Vouchers

Clicking on the button will display information about the promotional vouchers if any exist against the order. The information shown will be the voucher number, the barcode (scrambled if required by the barcode format) and the voucher name.

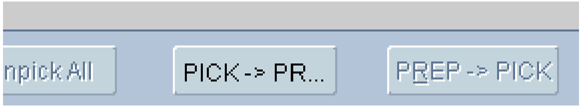


6.2.7. Unpick All

This button is no longer required and should be ignored.

6.2.8. Pick -> Prep

If you have a pick despatch note outstanding without a pick note raised against it, you might want to allocate further goods against the order or change order details. You will need to set the order back to PREP and the Pick -> Prep button is used for this purpose.



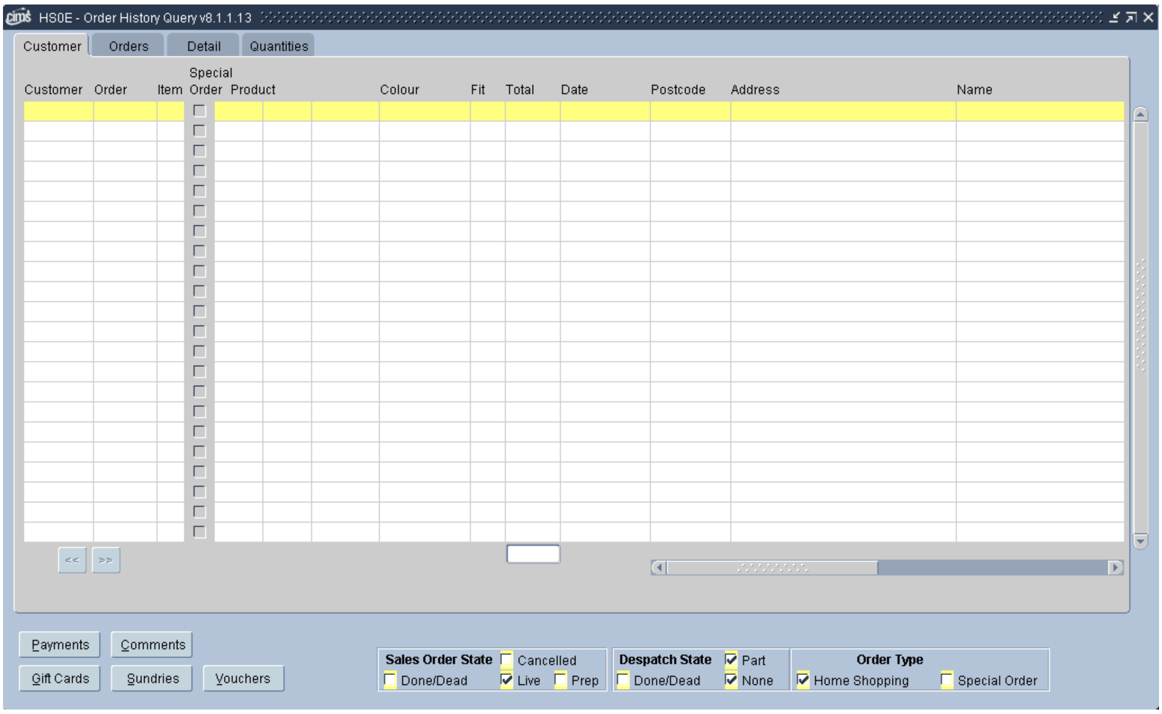
This will prevent the warehouse from starting to process the order until you have completed your amendments. If the order has already started to be picked in the warehouse, this button will not be available and so no further changes can be made.

6.2.9. Prep -> Pick

Once the changes have been made, the order can be set back to PICK using the Prep -> Pick button.

7 OTHER PROCESSING

7.1. HS0E – Order History Query

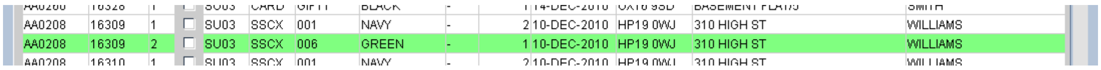


This screen is used to check the status of the Home Shopping orders within the system. There are a number of different views that can be seen by using the tabs along the top of the screen. The first 10 fields are identical on each view – Customer, Order, Item, Special Order tickbox, Product Code, Colour, Fit and Total. The remaining columns differ depending on the tab that is chosen.

The first screen that appears is the Customer tab.

- The screen is automatically in query mode with default settings against the tickboxes at the bottom of the screen. Enter information to find the specific order and press F12 Execute Query

- If the row is an auto entry item, (promotional item), it will be highlighted in green in a similar way to the bottom block of HS0A Home Shopping Order Entry:

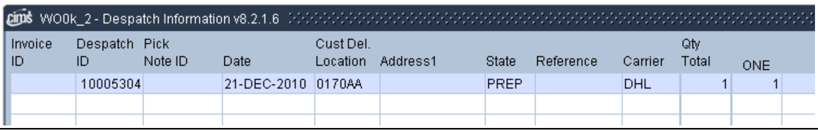


This screen can be accessed from the Order History button in HS0D Returns (see section 8.1). By default, only those rows relating to the sales order ID specified in HS0D Returns will be displayed; the tickboxes in the bottom block will be set as follows:

Area	Tickbox Settings
Sales Order State	Cancelled – un-ticked Done/Dead – ticked Live – ticked Prep – ticked
Despatch State	Part – ticked Done/Dead – ticked

Area	Tickbox Settings
	None – ticked
Order Type	Home Shopping – ticked Special Order – ticked

The different tabs are explained in the following table:

<table>
<tr><th>Tab</th><th>Details</th></tr>
<tr><td>Orders</td><td>This shows details of the order i.e. Date, Currency, Unit Price, Total Price, Reference, Header State, Despatch State, Order User ID, Last Updated Date, Last Updated User ID and Product Description.</td></tr>
<tr><td>Detail</td><td>This shows the progress detail of the order i.e. Prep, Pick, Pack, Invoice, Docket State, Return Quantity and Return Total Value. All the fields are visible on one screen. The following table explains the Prep, Pick, Pack and Invoice fields:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Prep</td><td>This is the total quantity of the product/colour/fit currently allocated to a despatch note with a state of PREP. A PREP despatch note usually denotes that the goods have not yet been picked, but have been reserved for that customer.</td></tr>
<tr><td>Pick</td><td>This is the total quantity of the product/colour/fit currently allocated to a despatch note with a state of PICK. A PICK despatch note usually denotes that the goods are about to be picked or are in the process of being picked.</td></tr>
<tr><td>Pack</td><td>This is the total quantity of the product/colour/fit currently allocated to a despatch note with a state of SEND. A SEND despatch note usually denotes that the goods have been picked, but have not yet been despatched.</td></tr>
<tr><td>Invoice</td><td>This is the total quantity of the product/colour/fit that has been invoiced. This means that the Despatch Note has been confirmed and the goods have been sent to the customer.</td></tr>
</table>
If you double click on any of these columns, a pop up window will appear showing further information on the despatches that have been created:

</td></tr>
<tr><td>Quantities</td><td>This shows the quantities by size.</td></tr>
</table>

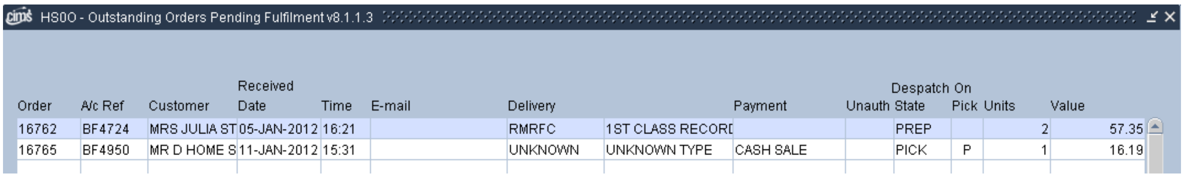
The buttons are explained in the following table:

Tab	Details
Payments	This shows the method of payment used.
Comment	This shows any comments that have been applied to the order.
Gift Cards	If applicable, this shows the gift card number attached to the order.
Sundries	This shows any sundry cost details that have been applied to all orders for that customer.
Vouchers	If applicable, this displays a pop up window showing all of the promotional vouchers attached to the order.

7.2. HS0O – Outstanding Orders Pending Fulfilment

This screen displays all LIVE home shopping orders where there is an outstanding despatch in a state of PREP or PICK. It is a query screen only; no records can be updated, created or deleted in this screen.

NOTE: only one despatch can be done against an order at any one time.



Field	Description
Order	This is the unique CIMS order number.
A/c Ref	This is the customer's Short code.
Customer	This shows the customer's title, first name and surname separated by spaces but concatenated in this single column.
Received Date	This is the date on which the initial order was placed and is taken from the order header; the oldest will be shown first. The format is DD-MON-YY.
Time	This is the time when the initial order was placed and is taken from the order header. The format is HH:MM.
E-Mail	This is the primary email address of customer as picked up from HS0N Customer Address Maintenance.
The previous fields are fixed on screen – the following fields are shown on the scroll bar.	
Delivery	A delivery code can be derived in one of two ways: • Where carrier validation is being used • Where sundries are linked to a delivery cost through the sundry type e.g. Next Day Delivery If carrier validation is being used, each order will have a single sundry code linked to a carrier and this will be delivery method for the order. If carrier validation is not being used, a check will be performed to determine if sundry codes have been defined as sundry services e.g. Next Day Delivery. If this information is found, it will be shown as the delivery method. As it is possible to have more than one sundry service per order, they will all be shown in the field, separated by commas. If no carrier service or sundry service can be found against the order, the words UNKNOWN TYPE will be displayed.
Delivery description (no heading)	If the code is populated with something other than UNKNOWN TYPE, this field will show the description of the delivery code, assuming that one has been defined. This field cannot be queried.
Payment	This shows the payment method of the order. If the field is blank, this means that there is no authorised payment (see the following field Unauth).

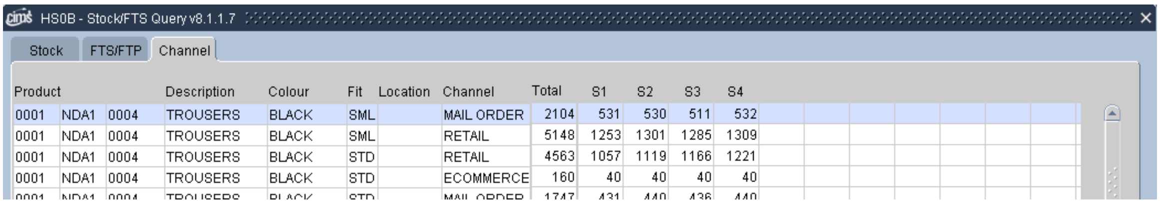
Field	Description
	Unauthorised payments are defined as all unauthorised payments and any authorised EFT payments that have not yet passed the CSC/AVS/Fraud prevention checks. If multiple payment methods have been used, they will be listed. In the following example, the payment is made up of CHEQUE SALE and CREDIT NOTE REDEEMED:
Unauth	As unauthorised payments do not show in the payments column, there is still a requirement to show any payments that are under review. This will be denoted by the letter R. If the payment is authorised, this field will be blank.
Despatch State	This is the state of the despatch and will either be PREP, PICK or PACK.
On Pick	The valid values for this field are blank and P. If this field is set to P, it means that the order is on a pick list i.e. a pick note has been created for the despatch. Nothing else can be done on this item as it is ‘frozen’ on CIMS.
Units	This is the net quantity of items still to be despatched. It will exclude any cancelled items from the ordered quantity. The field cannot be queried.
Value	This is the net base currency order value of items, including sundries, still to be despatched.
Returns	This shows the quantity of items being returned. This is no distinction between those items returned for replacement, exchange, refund or credit.
Notes	This tickbox denotes whether there are any Delivery Notes and/or Gift Comments against the order. If notes exist, the letter Y will displayed; if no notes exist, the column will be blank. This field can be queried meaning that the it will be easy to return despatches either with or without comments.
Delivery Notes	If any despatch requirement notes are entered against the order, these will appear in this column.
Gift Comments	If any gift comments have been entered on the order for entry on a gift tag, they will appear in this field.
Order Entry Screen button	Clicking on this button will open the HS0A Home Shopping Order Entry screen with the details of the specific order highlighted. If HS0A Home Shopping Order Entry, an error will be displayed saying that the form is already open; the original instance of the screen will need to be closed before accessing the screen using this button.
Comments button	Clicking on this button opens a new window showing the relevant order comments.

7.3. HS0B – Stock/FTS Query

This screen has 3 tabs:

- Stock – this shows the stock position by product option
- FTS/FTP – this shows FTS (Free to Sell) information i.e. stock in the warehouse that is available for ordering, and FTP (Free to Promise) information i.e. stock on order due to be delivered that is available for ordering
- Channel – this shows the channel stock position. The location field will only be populated if the channel calculation is being done down to warehouse level. If not, then the location field will be blank. NOTE: if channel is being calculated at a global level, rather than at a warehouse level, the warehouse cannot be queried in the Location field

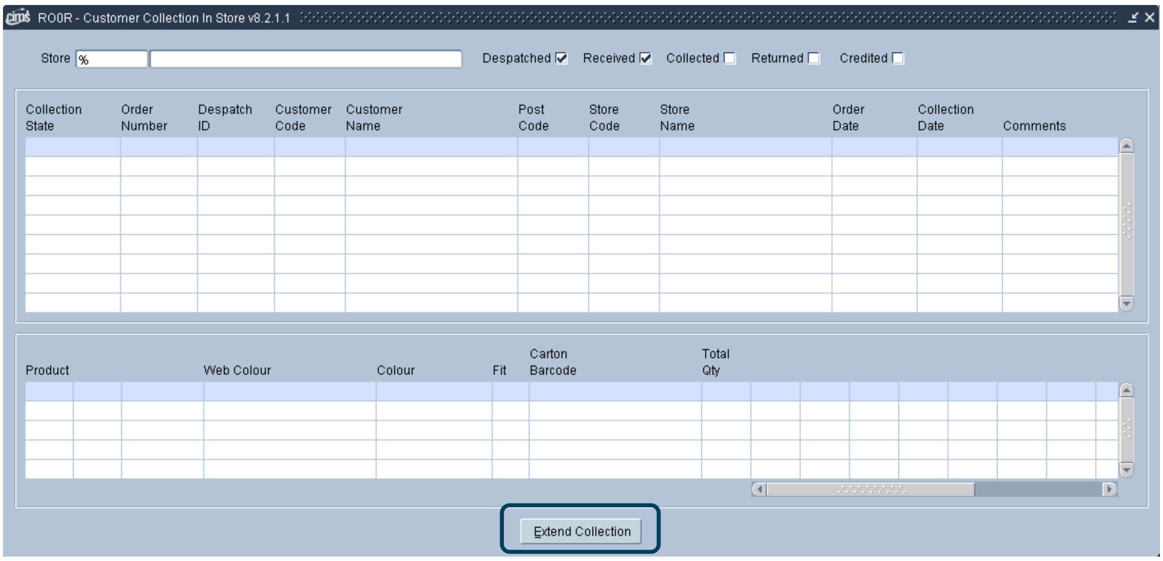
The following screenshot shows the Channel tab:



Week 0000 is always the current week and then subsequent weeks are shown.

7.4. HS0P – Customer Collection in Store

This screen has been added in V8.1 as part of the Buy & Collect process. There are 2 versions of the screen. The first is RO0R which is used by store users to manage the customer collection orders. The second is HS0P, which is used by Head Office users; this has an additional button called Extend Collection that is not visible to store users using RO0R. This button allows the collection date to be changed, which can only be done by Head Office users.



The default is that the screen will display orders on the way to the store and orders that are already in the store awaiting collection. The records will be ordered by Status, Collection Date and Order Number. However a specific query can be raised to view old orders i.e. those already collected, returned or credited, by ticking the relevant tick boxes in the header.

You are not able to insert any new records or delete any existing records but you can update some of the fields. The following sections relate to the HS0P version of the screen only; a separate document is available on the complete Buy & Collect process.

7.4.1. Header block

- The Store field will default as % meaning that all stores will be displayed in the middle block.
- Check the settings against the tickboxes; these are used to filter the information that is shown in the middle block and the states relate to those shown in the Collection State field:

  Despatched – this will be ticked as the default

  Received – this will be ticked as the default

  Collected – this will be un-ticked as the default

  Returned – this will be un-ticked as the default

  Credited – this will be un-ticked as the default

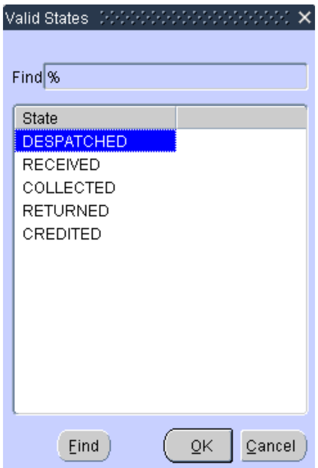
- Page down to the order details block

7.4.2. Order Details block

- Once on the order details block, F12 Execute Query to see all orders relating to the states selected in the header block. Alternatively, raise a specific query to view specific information.

  All fields are display only with the exception of Collection State and Comments.

Field	Description
Collection State	The following states are available and will relate to the tick boxes ticked in the header block: • Despatched – order despatched from the warehouse but not yet received in store i.e. the despatch has been set to DONE by the warehouse. This field will turn red if the system date is greater than the despatch date on the despatch plus the Overdue in Store Days field in HS9A Master Control Table
	
	• Received – order has arrived in store and the receipt has been acknowledged • Collected – order has been collected by the customer • Returned – the customer has failed to collect the order and it has been returned to the warehouse to be credited • Credited – the warehouse has received a returned collect in store order and created a WARN return. Head Office customer services will pick up this

Field	Description
	information, credit the customer and will change the status from Returned to Credited F12 Execute Query will display all the records that match the tick boxes that are ticked in the header. However you can also restrict the query further if required. This will be a subset of the data relating to the tick boxes ticked in the header. • Scenario 1 – all tick boxes in the header block are ticked and a query is raised in the items block where the Collection State is Received – only those rows in a Received state will be shown • Scenario 2 – only the Despatched tick box is ticked and a query is raised in the items block where the Collection State is Received – no rows will be returned because the data is not a subset of the data requested in the header block NOTE: a specific state must be entered in the Collection State field when raising a query; F9 List Values is available. % wildcards cannot be used.  Section 7.4.4 shows the rules in place for changing the states in the Collection State field.
Order Number	This is the CIMS order number.
Despatch ID	This is the despatch ID for the order.
Customer Code	This is the Home Shopping customer code.
Customer Name	This shows the title, first name and surname of the customer relating to the customer code displayed.
Post Code	This is the postcode of the main account address for the customer.
Store Code	This is the store code that the order relates to; F9 List Values is available in query mode.
Store Name	This is the store name relating to the store code displayed.
Order Date	This is the date that the order was placed on CIMS.
Collection Date	This field will remain blank until the despatch has been marked as received by the store. At this point, the date will calculated as the in-store date plus the customer collection days defined in HS9A Master Control Table.

Field	Description
	If the collection date has passed, the field will turn red. A customer may request that the collection date is extended. This is not changed directly in this field but is changed using the Extend Collection button (see section 7.4.5).

Comments	This is a user entered field, used to add any comments associated with the collect in store order. It will also hold information if the collection date is amended.

7.4.3. Items block

This block shows the information on the order highlighted in the Order Details block.

Field	Description
Product (3 fields)	This is the product code.
Web Colour	This is the colour from the website; this may or may not match the colour in CIMS depending on what settings are in place e.g. colour in CIMS could be BLK-BLACK and the web colour could be Black.
Colour	This is the colour from CIMS.
Fit	This is the fit of the product.
Carton Barcode	This is the carton barcode if applicable.
Total Qty	This shows the total number of pieces relating to the product/colour/fit.
Size Quantities	This shows the size of the product/colour/fit ordered.

7.4.4. Rules for changing the Collection State field

The Despatched state will appear automatically.

When the order arrives in store, the state should be changed from Despatched to Received; no other state can be selected.

When the order has been collected, the state should be changed from Received to Collected.

If the order is not collected, the state should be changed from Received to Returned.

Once the order is in a state of Collected, it can no longer be changed to any other state as the collection process is complete.

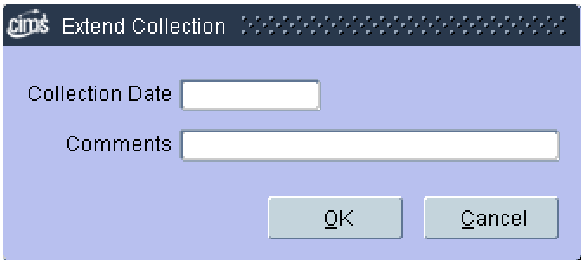
When a returned order arrives at the warehouse the state can be changed from Returned to Credited once a credit has been issued.

Once the order is in a state of Credited, it can no longer be updated to any other state; the collection process has failed and the goods have been returned to warehouse stock.

7.4.5. Extend Collection button

This button is used to change the collection date at the request of the customer; the collection date field itself in the Order Details block is non-updateable.

- Click on the button and the following pop up window will appear:



- F9 List Values on the Collection Date field to see a calendar window from which the date can be selected
- Add a reason for the update in the Comments field
- F10 Commit

At this point, the Collection Date field in the Order Details block will be updated and the reason for the update will be automatically entered into the Comments field in the same block. If there is more than one comment, the latest one will be concatenated to the front of the existing comments with a date prefix.

NOTE: dates can only be extended on orders with a delivery state of Received.

7.5. HS0Q – Batch Buy and Collect Store Alerts

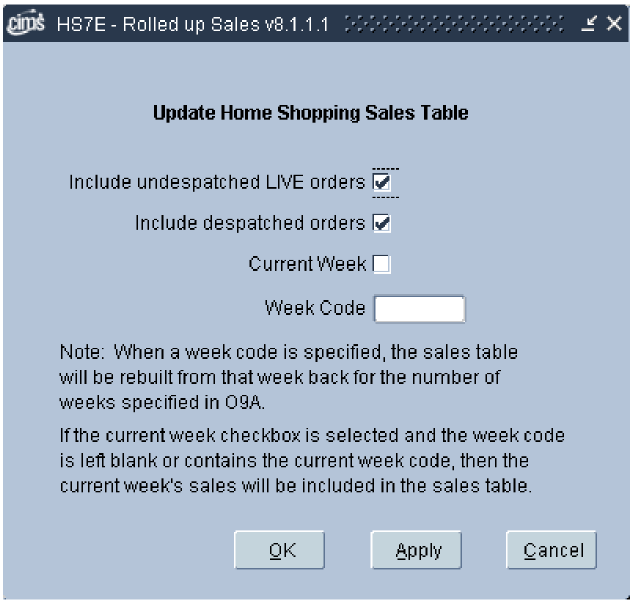
This screen has been added in V8.1 as part of the Buy & Collect process. It allows you to process despatch alerts raised for stores:

This process must be run after despatching has finished for the day but can be run as often as required. Each run will generate one email per store where there are sent buy and collect despatch alerts.

A separate document is available on the complete Buy & Collect process.

7.6. HS7E – Rolled Up Sales

This program is used to roll up all the home shopping order sales so that they can be used in CIMS Reporting (primarily the RMA Cube in Cube Reporting or B&M Answers in Reporting & Analytics).



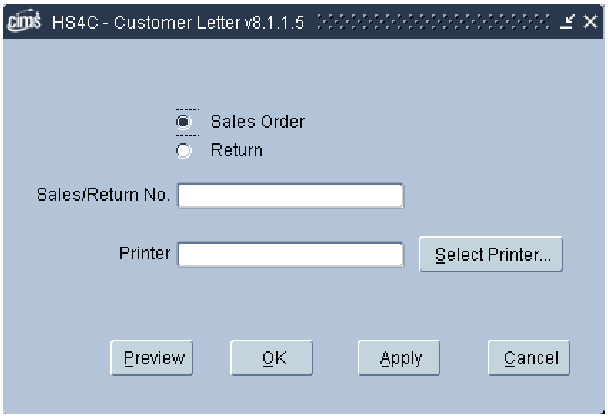
The amount of weeks that are built each week is based on the No. Of Weeks To Be Recalculated For Closing Stock Calcs field in WS9A Master Control table. The program is usually run once a week after the week has ended and before the reporting programs are run, although it can also be run during the week to get a cumulative sales position of the current week.

Field	Description
Include undespatched LIVE orders	These tickboxes are used to determine the types of despatches that will be included in the rolled up sales information.
Include despatched orders	
Current Week	If you want to build a cumulative sales position for the week you are in, this tickbox should be ticked. However, this would not be ticked in the normal task set up.
Week Code	If you want to build a one-off historical week, e.g. if sales had been missed in a historical week and therefore the week needs to be recalculated, the week code should be entered in this field. F9 List Values is available. However, this would not be entered in the normal task set up.

If the channel management software is being used, the channel calculation will correctly pick up despatches, returns and sundries in relation to the channels and warehouses depending on the channel calculation that has been adopted by the business.

7.7. HS4C – Customer Letter

If there is a need to print out a customer letter, this form can be used. Various formats are available; Prologic consultancy will be able to assist you in selecting the correct format on which to base your own format.

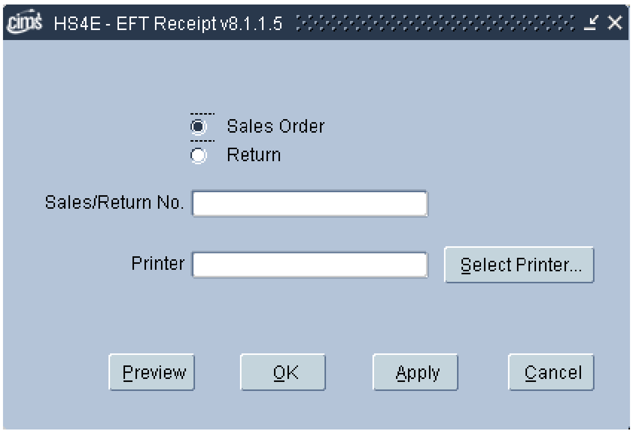


This screen can be used to run the despatch note p4o_3.rep, which is printed when a despatch carton is closed. This can be used in the event that ADC has stopped working temporarily so that the despatch note can still be produced. It will be printed 6 times for international deliveries (i.e. destined for countries not belonging to the EEC) as 5 copies are needed by Customs and Excise. If the delivery is within the EEC, only one copy will be produced. As this screen allows you to pass a sales order ID or return ID to the report, which could relate to multiple despatches, the system will determine which despatch should be included according to a number of rules:

- Sales ID is passed – only despatches in a state of PREP, PICK or PACK will be used. If there are no despatches in these states, the more recent despatch will be used. If more than one despatch has the same date, the one with the highest despatch number will be used
- Return ID is passed – the sales ID will be derived from the return ID and this will be used to determine the relevant despatch as before

7.8. HS4E – EFT Receipt Format

If there is a need to print out a receipt either for a sales order or a return, this screen will be used. However it is unlikely that this will be done frequently.

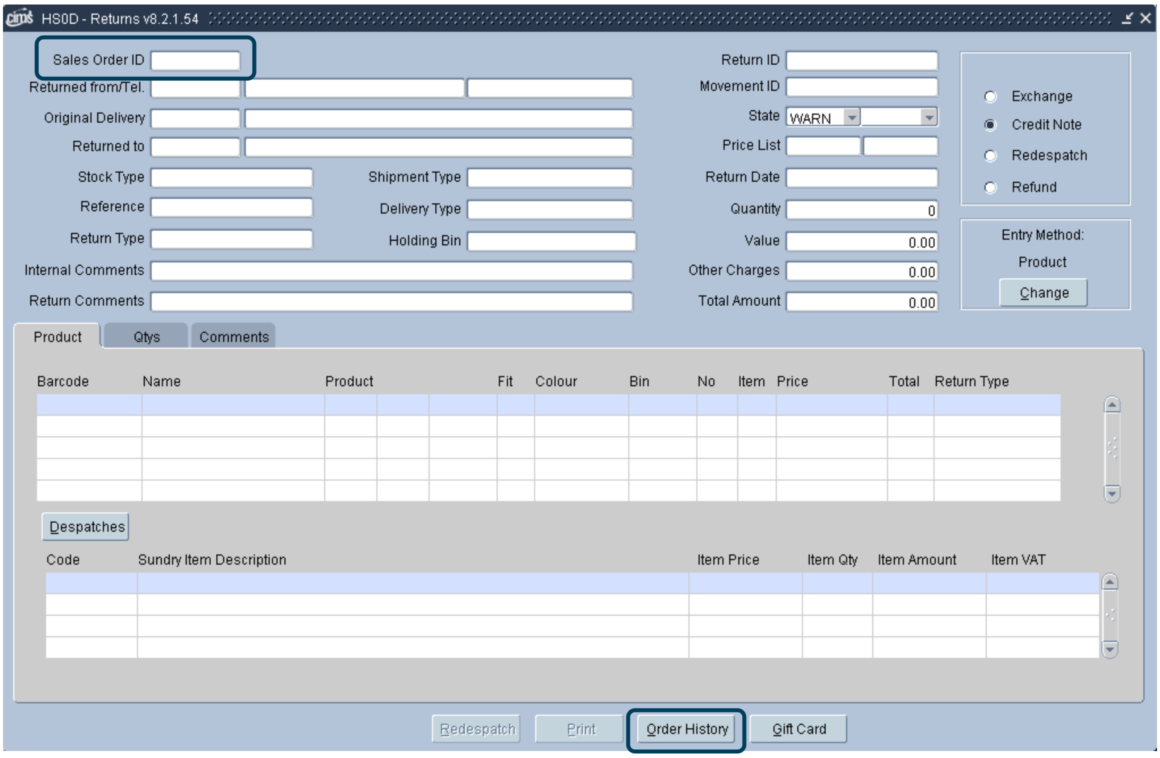


Enter the relevant details in the screen and either preview and print from the previous screen or print directly.

8 REFUNDS, REDESPATCHES AND EXCHANGES

8.1. HS0D – Returns

The point of entry for a Home Shopping Order return is the sales order ID. The sales order ID should be shown with the returns documentation; if this documentation is missing, the ID can be found by querying on the postcode in HS0E Order History Query (see section 7.1). This screen will need to be accessed separately rather than using the Order History button because the button can only be used when a valid sales order ID has been entered.



- F11 Enter Query; enter the sales ID and press F12 Execute Query

  In V8.1, a change has been made so that the price list will now be obtained from the order (if one exists) before going to the price list attached to the country that the customer resides in. In addition, if an order being returned was originally delivered to a store as part of the Buy & Collect process, the original delivery address defaults to the customer rather than the store as the store is not applicable in this instance.

- Move to the Reference field and complete; typically, this will be the initials of the person processing the return

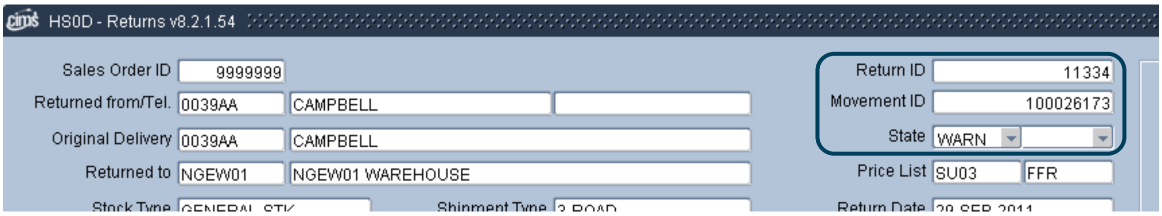
- Move to the Return Type field. F9 List Values and select

  Entering this into the header will copy it down to the products that are being returned. If the customer is returning more than one product and the reasons for return are different, this field can be left blank with the correct codes being attached at line item level instead

- If required, Internal Comments and Return Comments can be added. These are both 200 character free text fields

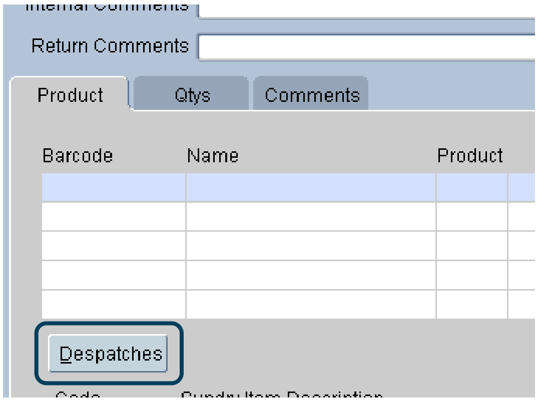
- F10 Commit

At this point, a Returns ID and a Movement ID in a state of WARN will be generated for the return:



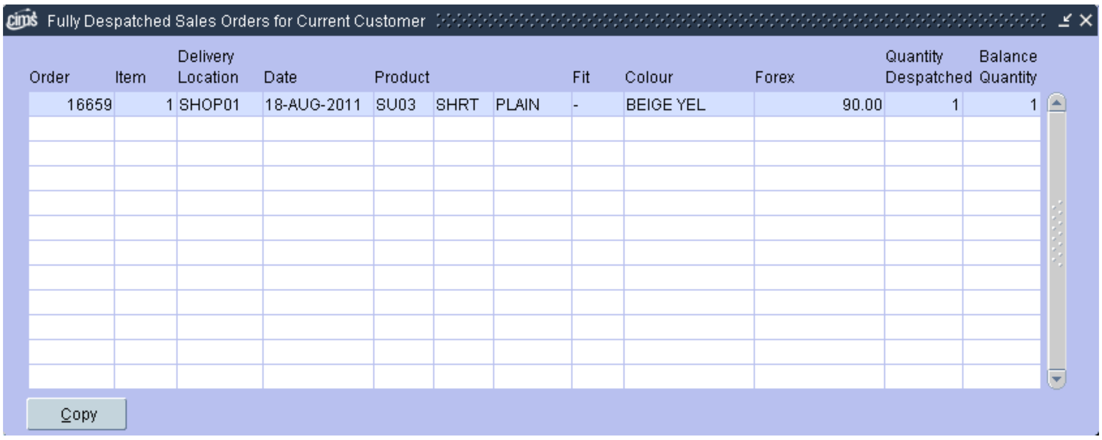
The Gift Card button is only enabled when the order contains a gift card. As gift cards are not covered by distance selling regulations, this means that it isn't mandatory for the business to refund the value of the gift card purely because the customer has changed their mind. However, there may be circumstances where a refund of a gift card is required. If a gift card does need to be returned and the money refunded, pressing the button will display a new pop up window that will enable you to find the specific card relating to the order. A check will be made to ensure that the money being refunded matches the balance on the card, which may or may not be the same as the original amount that the card was purchased for. More information on gift cards can be found in the separate document Home Shopping – Gift Cards.

- Click on the Despatches button on the middle block:



A pop up window called Fully Despatched Sales Orders for Current Customer will be displayed

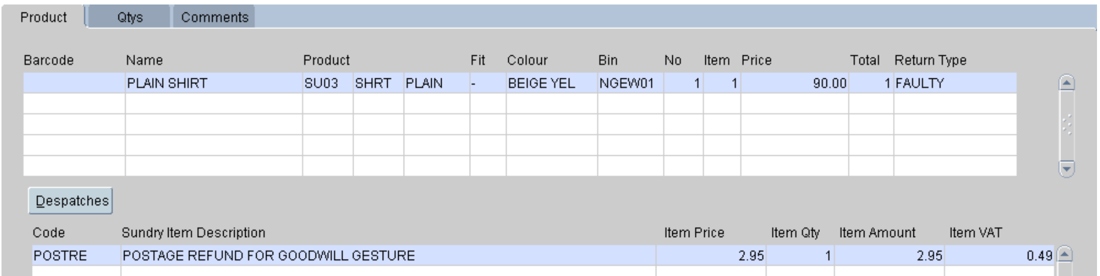
- F12 Execute Query; this will bring back all the despatches that have been made against that order:



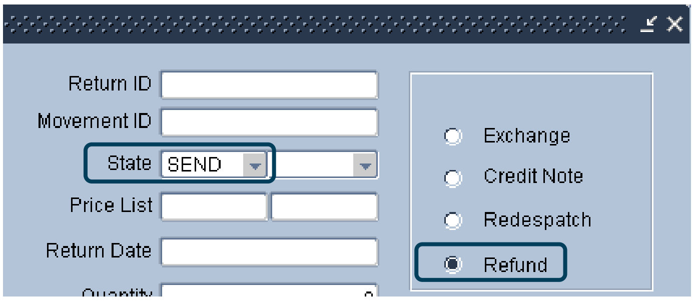
- Select the item that you want to return and press the Copy button; this will populate the middle block of the returns screen; the quantity will default to the balance shown on the despatch.

- Click on the Qtys tab; NOTE: if you haven't entered a return type in the header, you will be prompted to enter one before you can move to the Qtys tab

- If required, amend the quantity being returned e.g. the customer ordered 2 of one size but is returning 1
- F10 Commit
- If any Sundry costs need to be refunded, move to the bottom block; otherwise leave this block blank
- F9 List Values and select
- Amend the description and value as appropriate
- F10 Commit

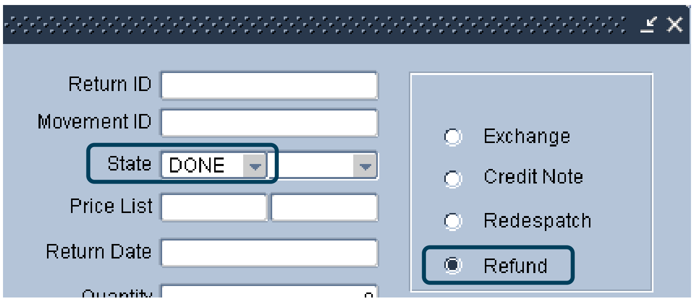


- If a straight refund is being made, (i.e. no goods are being taken in exchange), click on the Refund radio button and change the state to SEND:

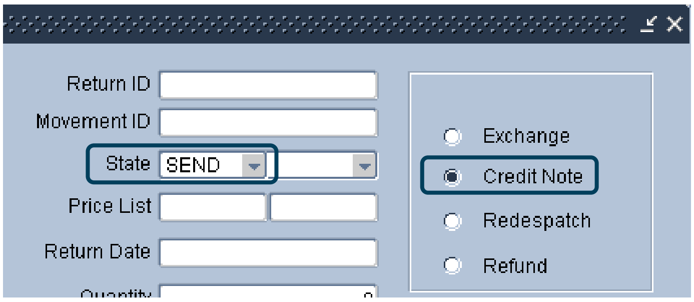


- F10 Commit
- A screen will appear showing the suggested refund against the different refund methods. The amounts can be changed as required depending on the over refund settings in place (see section 8.2).

  Refunds can be made to a gift card regardless of whether the gift card was on the original order as long as the gift card refund method defined in HS9C Valid Refund Methods is set to over refund i.e. more money can be refunded back onto the gift card than was originally on the gift card. NOTE: the maximum limit defined in HS9A Master Control Table will still apply.
- Once you have completed the refund, the return state changes automatically to DONE.



- If you know in advance that a credit note should be raised, you can select this radio button on the main screen before changing the State field to SEND and committing to the database.



- A different box will appear asking you to confirm that you want to raise a credit note for the specified amount
- Click on Yes and continue to process the refund

8.2. Over Refunds

There are a number of legitimate reasons why an over payment might need to be given to a customer when a refund is done e.g. a customer has paid for a product plus postage and the business decides in this instance to not only refund the original postage but also to refund the return postage.

You are able to continue with an EFT refund in this scenario; specific rules apply depending on whether the order has been paid in full or in part by EFT.

NOTE: refunds are looked at per cardholder/order rather than per card/order. For example, an order for 2 products is paid for with one credit card. One of the products is out of stock and so the order is part shipped. The second product comes into stock 4 weeks later, but the original card has now expired. The customer pays for the second item by a second credit card. They then return the first item. The refund will not be applied to each credit card as the system will see the two cards as one. The refund will be applied in this instance to the second credit card.

Order paid for by EFT only

An over refund can be triggered by one of the following scenarios:

- Adding further sundries to a return therefore creating a negative net order value. The return will not be a re-despatch
- Increasing the value of items being returned, therefore creating a negative net order value

Order paid for by a mixture of EFT and other payment methods.

An over refund can be triggered by one of the following scenarios:

- Adding further sundries to a non re-despatch Return therefore creating a negative net order value
- Increasing the value of items being returned, therefore creating a negative net order value
- Having the option to refund the other payment method by EFT instead

F9 List Values is available on the first Refund Method field and will allow you to change the refund method shown. The following screenshot shows that the original £80.00 order was paid for by:

£55.00 – EFT

£5.00 – Credit Note

£20.00 – Gift Voucher

The refund was made up of:

£75.00 – EFT

£5.00 – Credit Note

The summary at the bottom of the screen shows the totals.

NOTE: the order of the refund methods shown in F9 List Values is determined by the setting of the Offer Credit Note as First Refund Method tickbox in HS9A Master Control Table. If this is ticked, Credit Note will be shown before the suggested refund method. If un-ticked, these values will be reversed.

NOTE: if a return is being processed for a refund, but the original order is either unknown or not recorded in CIMS, the user can create a return against the pseudo order ID of 9999999. In this scenario, the user would be advised that no funds were available to refund the customer, but could use the Over Refund function to refund the value returned as a Cheque or Credit Note. It is not possible to raise an EFT refund in this scenario.

The following scenarios explain what happens against some specific circumstances:

Scenario 1

There may be some circumstances where your preferred method of refund is not possible depending on the settings against certain flags. The following scenario shows an example of where this could occur. Some assumptions have been made:

- The Over Refund tickbox against the EFT payment method in HS9C Valid Refund Methods is left un-ticked
- The sort order against the EFT and Cheque payment methods in the same screen is defined as EFT = 3 and Cheque = 6

A customer purchases 3 products – Product A = £25, Product B = £50 and Product C = £100. The total is therefore £175.

The customer pays for this purchase with £75 EFT and £100 Cheque.

A refund is requested against Product A (£25). The refund method is shown as EFT £25 and the refund is put through. At this point, the EFT "balance" is £50 and the Cheque "balance" is £100.

A second refund is requested against Product C (£100). As there is only a "balance" of £50 left against the EFT method, you will not be able to refund the customer by using EFT, as there is a deficit of £50. As you cannot split the refund amount between the two refund methods on this second refund, you will either need to refund the customer by Cheque or choose an alternative method assuming that one has been defined e.g. Credit Note.

A third refund is requested against Product B (£50). This time, you can use EFT for the refund as there is enough "balance" left. In this scenario, the final balance is therefore £0.

Scenario 2

A customer places an order that totals £200 and pays for this purchase with £100 Cheque and £100 EFT.

£50 worth of products is returned for a Credit Note; the net payment balance by payment type is:

Cheque £50 (£100 - £50)

EFT £100

As there is no Credit Note payment to put the £50 refund against, CIMS takes this away from the Cheque balance instead. As described in Scenario 1, this means that any future Cheque refunds are now restricted to £50 even though nothing has actually been refunded by Cheque; the Credit Note value has to be accommodated somewhere on the order and it's always the cheque that will be affected.

If the remaining products were returned, a refund of £150 would need to be done against the order as follows:

Cheque £50

EFT £100

The net payment balance by payment type is:

Cheque £0 (£50 - £50)

EFT £0 (£100 - £100)

Although this it technically correct, £50 of the original Cheque payment has been substituted with a £50 Credit Note instead.

If the £50 Credit Note was then spent on the order, the net payment would be:

Cheque £50 (£50 - £50 - £50)

EFT £0

If a refund was then required on the product purchased with the Credit Note, the refund could therefore be done by Cheque.

8.3. eCommerce order returns

The Restrict Returns radio button settings, which are on the Order section of the Validation tab of HS9A Master Control Table, are not referenced by the eCommerce Portal. This means that a returns header can be created before the goods have actually been returned. However, this is not an issue for web orders because users will not be allowed to add anything to the headers until the returned goods have been received.

In order history, when checking for refunds (for returns or exchanges), this ensures that only returns that have been processed are shown i.e. where the state is set to DONE or DEAD.

8.4. HS0D – Returns – Redespatch

If an order is lost in the post, part of an order has arrived damaged or items are missing even though there is a record of the item being despatched, it is possible to redespatch the goods without having to raise another order.

The process is exactly the same as for a return:

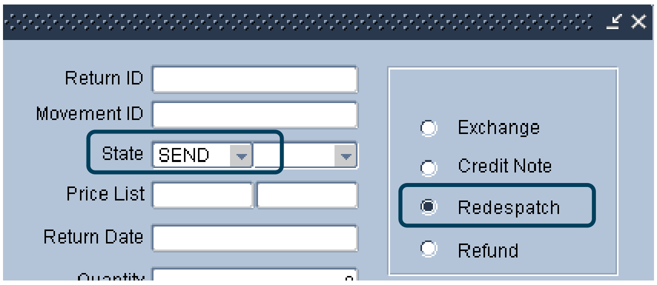
- F11 Enter Query; enter the sales ID and press F12 Execute Query
- Move to the Reference field and complete; typically, this will be the initials of the person processing the return
- Move to the Return Type field. F9 List Values and select

Entering this into the header will copy it down to the products that are being returned. If the customer is returning more than one product and the reasons for return are different, this field can be left blank with the correct codes being attached at line item level instead

- If required, Internal Comments and Return Comments can be added. These are both 200 character free text fields
- F10 Commit

At this point, a Returns ID and a Movement ID in a state of WARN will be generated for the return:

- Click on the Despatches Button on the second block and F12 Execute Query
- Select the item that you want to redespatch and confirm the quantities on the Qtys tab e.g. 3 may be been sent of an item, but only 2 have arrived, therefore you will only want to redespatch 1 item
- F10 Commit
- Click on the Redespatch radio button and change the state to SEND



- F10 Commit; you will then get the following message:

  Re-despatch created. New despatch number is XXXXXXXX

- Click on Yes, which will create the despatch and change the state to DONE

8.5. HS0D – Returns – Exchanges

The exchange process starts in HS0D Returns. It is a 2-part operation:

- Part 1 is returning the goods to be exchanged in HS0D
- Part 2 is ‘selling’ the goods that complete the exchange in HS0A

The process starts in the same way as a return.

- F11 Enter Query; enter the sales ID and press F12 Execute Query
- Move to the Reference field and complete; typically, this will be the initials of the person processing the return
- Move to the Return Type field. F9 List Values and select

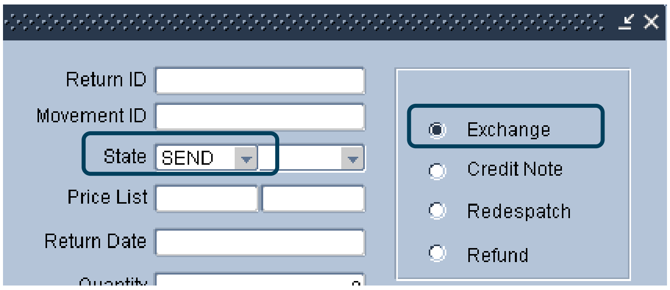
  Entering this into the header will copy it down to the products that are being returned. If the customer is returning more than one product and the reasons for return are different, this field can be left blank with the correct codes being attached at line item level instead

- If required, Internal Comments and Return Comments can be added. These are both 200 character free text fields

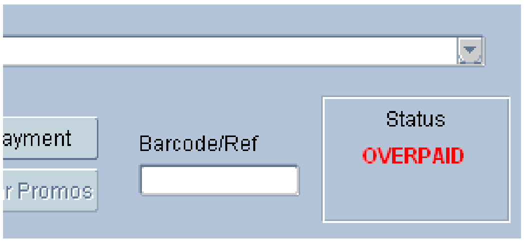
- F10 Commit

At this point, a Returns ID and a Movement ID in a state of WARN will be generated for the return:

- Click on the Despatches Button on the second block and F12 Execute Query
- Select the item that you want to exchange and confirm the quantities on the Qtys tab e.g. 3 may be been sent of an item, but the customer only wants to exchange one of these
- F10 Commit
- If any Sundry costs need to be refunded, move to the bottom block; otherwise leave this block blank
- F9 List Values and select
- Amend the description and value as appropriate
- F10 Commit
- Click on the Exchange radio button and change the state to SEND



- F10 Commit; HS0A Home Shopping Order Entry will be opened and the Status will show as OVERPAID:



- Move to the bottom block and enter the goods that are being sent to the customer in exchange
- F10 Commit

  If it is a one-for-one swap, OVERPAID will disappear from the status box.

- To double check that no further payment is required, click on the Payment button. The screen that is displayed will show if any further payment is required. The bottom block of the screen shows the details of the exchange

  If further payment is required, continue to process the transaction in the normal way.

- Close the order entry window and you will be taken back to HS0D Returns. At this stage the state of the exchange will be set to DONE.

8.6. Processing a partial refund for a credit card transaction where the payment hasn't yet been received

There may be an instance where a partial refund needs to be made on an order but the goods haven't yet been despatched.

Example

- A customer buys £100.00 worth of products either via Mail Order or eCommerce and pays an additional £10.00 for next day guaranteed delivery (normal standard delivery in this instance is £2.50)
- The cut off time for orders with a guaranteed next day delivery is 12:00pm and this order is placed and confirmed at 11:55am
- During the afternoon, the business realises that they are not going to be able to despatch the order and therefore will miss the next day guaranteed delivery. The customer is contacted and offered a complete refund of the delivery charge as a goodwill gesture
- The refund of £10.00 is put through but as the goods haven't been despatched there is no money to refund from and so it is held in a transient state. The balance of the order is therefore £90.00.
- The goods are then despatched. Rather than charging £100.00 and then refunding £10.00, the system only applies the net value of the order to the credit card e.g. £90.00. This is the amount that the customer will see on their credit card statement

9 CDI PROCESSING RELATING TO PROMOTIONS

9.1. CDI Order Items Table

The CDI order load data configuration handles promotions applied to home shopping orders by 3rd parties.

A column called Promotion Code exists on the CDI order item table and the 3rd party will use this to show the promotion code where a product has qualified for or been the target of a promotion.

The promotion code is not mandatory but if passed in by the 3rd party, the code must match an active promotion in CIMS. If a match isn't found, an exception will be raised and the order will remain in CDI pending correction.

Whilst the promotion code must be an actual promotion code in CIMS it will not be validated. There will be an assumption on the part of the CDI loader that the promotion will have been correctly applied. If a promotion has expired in CIMS it will still be accepted in the CDI tables as valid for the order.

9.2. CDI CIMS eCommerce portal order Promotion Validation

Because of the difficulties involved in retrospectively trying to validate promotions applied to an order, in particular the timing and presentation of online order promotions, these promoted items will not be re-validated when created by the CIMS eCommerce solution. The CIMS eCommerce solution is therefore responsible for creating valid order promotions.

Wherever the CDI Sales Order interface is used by the CIMS eCommerce solution, there will be no promotion validation other than to check the promotion code itself exists. This will be achieved by a flag passed in with the CIMS eCommerce order indicating its source.

9.3. Validation for non CIMS eCommerce orders

For all non CIMS eCommerce orders, any promotional codes supplied with an order item must be internally consistent with the order header and other items entered.

9.3.1. Order Status Promotion Validation

Any promotional codes used on the order items must be a valid for the following criteria for all promotion codes.

- Order Shop
- Order Catalogue source
- Order Currency
- Order Price list
- Order date and time
- If a Gift Voucher is required, then a valid voucher must have been included with order

9.3.2. Item valid for promotion code

Every item recorded with a promotional code must either match the promo definition trigger or target items:

- Show as valid all order items matching the trigger items from the promotion code header
- Is there a minimum quantity required by the promotion code? If it's more than one are there sufficient triggering items referenced?
- If the promotion is flagged as exclusive and is also the highest priority promotion, then there can be no other promotion codes on the order
- Show as valid all items for the promotion code targeted by the promotion definition
- If the "All Required" flag is true then check ALL target items for the promotion are present with the promotion code

NOTE: if a promoted product is both a possible qualifying product as well as target product, it will be seen as valid for both tests as no distinction will be made here.

9.3.3. Valid Basket Promotions

Where a Basket promotion is triggered by a product promotion, the promotion sundry code defined with the promotion header must be present on the order.

In reverse if a promotional sundry code is present and the triggering items are not present on the order with the corresponding promotion code then validation will fail.

9.3.4. Valid Sundry Promotions

Any Promotional sundry codes included to discount the sundry due on an order must have a least one valid promotion definition triggering sundry code present on the order.

Whilst there could be any number of triggering sundry codes requiring validation there only needs to be one valid triggering sundry code to validate a target promotional sundry code. This valid triggering code can validate any number of promotional sundry codes. The reason for this is there's no link between triggering sundries and target promotional sundry codes in the final order.

9.3.5. Validation exclusions:

Validation does not validate the following promotion scenarios:

- Auto entry items
- The promotion value applied to target items
- The number of times a promotion has been triggered on an order; each promotion code only has to satisfy the minimum requirement on the order

9.4. CDI Voucher Processing

Once the complete CDI order passes validation, any voucher information included will be transferred to CIMS home shopping as if keyed through CIMS order entry.

There is no requirement to reprocess promotions on the CDI order, all promotions will already have bee applied to the order. However, CDI will need to register incoming single use barcodes in the normal way, to prevent reuse.

Vouchers used on CIMS eCommerce orders are not validated against the promotion code; they are simply redeemed where valid to do so. If they cannot be redeemed, they will fail validation as normal.